News from Busworld Turkey 2018.
Articles from Truck & Bus Builder - May 2018 Volume 40 Issue 5.

Latest version of Allison 2000 Series transmission for buses available from September

USA / Turkey - Allison Transmissions Inc of Indianapolis, USA, through its local distributor, İklerler Makine Servis San ve Dis Tic A.S. of Istanbul, Turkey, the automated transmission specialist exhibited upgraded versions of its 2000-series range of automatic transmissions for buses and coaches at Busworld Turkey this year. Three years in development, the models in the range feature a number of improved features over previous models.

For instance, Allison has developed further its First Lookup Option in its new range of transmissions. At low speeds the transmission links to the engine mechanically, rather than through the fluid coupling converter - allowing for less energy to be wasted at low speeds. Another new feature, ‘Neutral-at-Start’ puts the transmission into neutral when at very low speeds, developed to save fuel for buses used in congested urban environments.

The new models all include Allison’s XFE (Extra Fuel Economy) modification, where the gear ratios in the low and high ranges have been altered to improve fuel economy when the vehicle is stopping and starting frequently - again, developed specifically for urban bus applications.

The 2000-series transmissions also feature Allison’s latest electronic control system, called Fuelsense 2.0 - a technology which allows for “smarter” gear shifts, again for increased fuel economy. Cem Erbas, application engineer for Turkey and the Middle East, asserted the system improves fuel economy by approximately 7% compared with previous models - and added that the new system has been Allison’s “most important development” this year.

The Fuelsense 2.0 system makes use of a patented algorithm, called Dynamic Shifting, which is able to read the road and driving conditions and thereby choose to place the transmission in Performance or Economy modes.

In Economy mode, the transmission switches gears in the closest possible alignment with the engine speed, thus saving fuel. The system also includes an analytical tool called ARM (Acceleration Rate Management). Information about rates of acceleration and braking is recorded within the component, and is fed into the Dynamic Shifting algorithm - which then automatically alters the transmission’s gear shifts for maximum efficiency.

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The new range is currently in production and has sparked serious interest among large manufacturers, stated Erbas at the show. This new upgraded version of the 2000-series range of automatic transmissions for buses and coaches is scheduled to be available to buy starting this autumn.

Investment / Strategy

BMC modernising CV plant in Izmir

Turkey - Commercial and armoured vehicle builder, BMC Otomotiv Sanayi ve Ticaret AS of Izmir, Turkey said it was making good progress in reorganising and upgrading its manufacturing plant in Izmir, Turkey, according to Bulent Sancricolu, deputy general manager at BMC.

Sancricolu said that with money from BMC’s Turkish and Qatari shareholders, it was modernising its factory in Izmir for the future production of military vehicles, on-highway trucks and buses.

The company has been developing a new range of heavy truck and tractor modes for the construction, long haul and distribution markets, which are due to be brought to market during 2018. It plans to fit either Cummins or FPT engines in order to meet modern emissions requirements.

The site is also being prepared for future production of a medium and light duty range of trucks.

Sancricolu said the facilities in Izmir were being completely re-organised; this included the construction of new buildings, use of robots, wherever possible, and a large KTL treatment plant for vehicles up to 15m in length. Sancricolu said that the KTL plant was on schedule to be completed by mid-2018 and construction and modernisation works to be fully operational by 2019.

Bus production, which is currently undertaken at the Do anlar plant, is to eventually close and production transferred to the new truck plant. As well as trucks, bus production will utilise the KTL treatment baths and new production work procedures designed to make use of increased robotic welding and painting on a just-in-time basis. All buses are built using a monocoque body structure made of KTL-treated carbon steel for which it is offering a 15-year corrosion warranty. At the show, BMC announced five new buses that are to enter the market place in 2018.

BMC has already started construction of another plant in Karasu, the site of which extends to 2.2 million square meters (222 hectares) and which, when finished, is to produce battle tanks, armoured-tracked vehicles, wheeled-armoured vehicles, tactical wheeled vehicles, metro and light rail systems. It will be in operation in 2020.

According to Sancricolu, BMC is producing some 300,000 vehicles (mainly military) a year and exporting to 80 countries. It has set a turnover target of USD1bn this year (2018), and USD2bn over the next three years, when it will benefit from the large expansion of its manufacturing capacity paid for by the Qatari sovereign wealth fund; an amount which equates to an investment of some USD568m in BMC during the last two years. This money has allowed it to modernise the existing Pinarsasa facility, which employs more than 2,000 people, 1,458 factory workers and 709 managerial / professional staff.

Product / Manufacture

Anadolu Isuzu Novociti Life 8m bus now in build

Kocaeli - Anadolu Isuzu Otomotiv Sanayi Ticaret A.S. of Kocaeli unveiled the new low-floor Novociti Life at Busworld Turkey this year.

First exhibited at Busworld Kortrijk in Belgium in 2017, Anadolu Isuzu used Busworld Turkey as its official market launch – announcing that the city of Bingöl had recently placed an order for 80 of the new buses. Tu rul Ankarı, CEO of Anadolu Isuzu, said: “We’re confident that the new Isuzu Novociti Life with its low floor platform and operating cost advantages will also be greatly welcomed both in Turkey and in our international markets.”

The Novociti Life is 8 metres long and capable of carrying up to 60 passengers, six more than the 7.5m Novociti.

Anadolu Isuzu states that the bus has been designed with particular attention to the needs of disabled passengers. As well as the low-floor platform, the Novociti Life has a new window design which allows more daylight to enter the bus by the wheelchair bays. Another innovative design feature is the engine compartment. Located at the rear of the bus, greater access is afforded from all three sides, which potentially reduces maintenance time on the vehicle.

The bus employs a 4.5-litre FPT brand NEF4 model engine, which generates 680Nm of torque at 186hp. The engine meets Euro-6C emissions standards without needing an exhaust gas recycling (EGR) system, thus allowing for greater fuel efficiency at low speeds. The engine comes with the option of a ZF 6S 1010 BO (O) manual gearbox or an Allison 2100 (S) automatic gearbox.

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Turkey gears up for bus electrification

Turkey - At Busworld Turkey this year, there was a marked focus on low- or zero-emission vehicles with BMC, Anadolu Isuzu and Guleruyz all exhibiting new electric-powered and CNG buses, with Otokar announcing its intentions to produce a new generation of e-buses in the near future; having been among the first to manufacture e-buses some years ago.

Manufacturers exhibiting diesel buses were at pains to point out the emissions improvements that diesel engines have shown over the past few years, but there was a clear consensus among bus manufacturers that the majority of R&D over the next few years would be principally geared towards the development of electric, and to a lesser extent, CNG buses. Although most of the buses on display this year were available either as CNG or diesel vehicles, there was a general sense that CNG was a stopgap low emission fuel, to be provided as an alternative whilst improvements in electric buses were made.

Otokar’s deputy general manager, Basri Akgül stated that demand for CNG was relatively low and that there had not been much interest from Turkish municipalities for CNG vehicles; this despite ready availability of alternative fuels at pump prices. Component manufacturers also showed readiness in the upsurge in future demand for electric vehicles.

Cummins exhibited its new electric engine – see article below - and ZF displayed its prototype CeTrax, both of which are designed to allow cities and fleet operators to convert their diesel fleets to electric power, if required.

In a presentation entitled “Brief Insight on the Turkish Bus Market”, hosted by Busworld Academy, Sedat Çinar, deputy director of Commercial Vehicles, Public and Special Vehicles Sales at BMC, asserted that globally, the electric bus market will grow at a rapid annual rate of 33.5% between 2017 and 2025 - meaning that by 2025, half of the vehicles sold worldwide will be electric. Much of that growth is currently driven by China; nonetheless, North American and European manufacturers are also concentrating on the production of electric buses as demand is increasing, largely being stimulated by low emissions policies in European and North American towns and cities – which are setting more stringent targets, often at a local level than at a national government level. Since approximately 50% of the world’s population live in towns and cities, there is significant potential which will be a decisive factor in the growth of the electric bus market.

Although the unit cost of an e-bus is greater than that of a diesel, combinations of tax incentives and subsidies will make the development of e-buses a profitable venture, he said. In Europe, these subsidies have been provided by ZeEUS (Zero Emission Urban Bus System), an EU governmental organisation and some countries in Europe have been providing their own incentives, namely the UK.

Çinar said that in 2015, more than 98% of the world’s 173,000 electric buses were in use in China. However, some 1,300 were sold in Europe just last year – a sign that while the actual bus market in Europe is much smaller, e-buses were set to make up a significant proportion of active fleets within the next few years. In addition to sales of new electric buses, in Turkey conversion of existing diesel-powered buses to electric power is also likely to accelerate after the first and successful large-scale conversion trial of 50 buses was carried out by ESHOT, Izmir’s municipal transport authority, earlier this year. According to Mrs Anna Ozdelen, the Local Mobility Consultant for Frost & Sullivan in Turkey, sales of full electric and diesel-electric hybrid buses are likely to increase significantly across all regions globally by 2025, excluding sub-Saharan Africa, which she projects will only account for 1.3% of e-bus market share (approximately 1,200 units sold p.a.) by 2025. Although China is to remain the biggest producer as well as consumer of e-buses, the reduction of subsidies to electric bus manufacturers, which began with a 20% reduction in 2016 (to be repeated year on year until 2019) is likely to cause its relative market share to drop to around 30% of the global market to approximately 75%, with Europe, the Americas and India accounting for most of the remaining quarter. Europe is likely to account for 7% of the global market by 2025, with an estimated 6,300 units produced that year, with India close behind at 6,200 units, giving it a share of 6.9% of the market. The Americas are to represent 2.6% of the market, split roughly equally between North and South – with North America producing 4,200 units, and the South America, 4,800 units.

Among the factors stimulating this increase are improvements in battery technology. Between 2010 and 2015, battery manufacturers reported an 8% increase in gravimetric energy density (gravimetric density defines battery capacity in weight ie kWh/kg), a 19% increase in volumetric energy density (reflects volume in litres ie kWh/l), a 10% increase in long-term battery life and a 23% reduction in manufacturing costs. These improvements have spurred manufacturers to develop new technologies – manufacturers are projected to be bringing out a new generation of Li-Si (lithium-silicon) batteries (as opposed to the Li-ion which are currently the industry standard). The new cathode may offer significant power-to-weight improvements, suggested Ozdelen, potentially bringing the cost per kWh down from the 2015 level of circa. USD270/kWh to USD170/kWh in 2020. By 2030, Ozdelen she indicated continuing improvements potentially could bring the price down to USD130/kWh.

Further growth could also be effected by investment in the appropriate charging infrastructure, suggesting global pantograph infrastructure could increase from averaging 150kW in 2015 to 450kW by 2025. The installation, be it in direct or indirect, could stimulate e-bus demand by allowing smaller manufacturers to produce buses with a range that is less limited by current battery constraints.

Whereas Çinar emphasised the ‘pull’ factors of subsidies and tax incentives in driving e-bus growth, Ozdelen emphasised the ‘push’ factors behind the widespread crackdown on diesel buses by European national and municipal governments. London intends to phase out purchases of new diesel buses by 2020, and ban diesel vehicles outright by 2025. Paris, Amsterdam, Rotterdam and Utrecht have already banned Euro 2 diesel engines, with annual phasing-out of Euro 3, 4 and 5 engines over the coming years, with a total diesel ban by 2025 in France and by 2030 in the Netherlands. Across Europe, most cities and national governments have planned to phase out diesel entirely between 2025 and 2030 – Italy has already passed a diesel ban, but will only begin enforcing it in a phased way over the next decade. Across the US, the results of the Oxford-based consultancy, LMC, in a lecture entitled “The Current Bus Market: A Global Perspective” situated the rise of e-buses within a generally positive outlook for the global bus market. Although 2017 saw the global bus market shrink 4%, which he blamed on the reduction in China’s subsidies for manufacturers during that year, he projected the global market to grow by approximately 8% by 2023. Indeed, he projects China to recover and grow by 4.7% this year.

South America, he said, is poised to show healthy growth, having largely recovered from a region-wide depression that accounted for 10% of the global market in 2015 to 2020 (reflects volume in litres ie kWh/l), a 10% increase in long-term battery life and a 23% reduction in manufacturing costs. These improvements have spurred manufacturers to develop new technologies – manufacturers are projected to be bringing out a new generation of Li-Si (lithium-silicon) batteries (as opposed to the Li-ion which are currently the industry standard). The new cathode may offer significant power-to-weight improvements, suggested Ozdelen, potentially bringing the cost per kWh down from the 2015 level of circa. USD270/kWh to USD170/kWh in 2020. By 2030, Ozdelen she indicated continuing improvements potentially could bring the price down to USD130/kWh.

As well as improvements in battery architecture, there has been strong investment in new battery technologies – manufacturers are projected to be bringing out a new generation of Li-Si (lithium-silicon) batteries (as opposed to the Li-ion which are currently the industry standard). The new cathode may offer significant power-to-weight improvements, suggested Ozdelen, potentially bringing the cost per kWh down from the 2015 level of circa. USD270/kWh to USD170/kWh in 2020. By 2030, Ozdelen she indicated continuing improvements potentially could bring the price down to USD130/kWh.
Cummins uses Busworld Turkey to provide update on electric engine systems progress

USA / Turkey - Cummins Inc of Columbus, Indiana, USA used the Busworld convention in Izmir, Turkey, last month to provide an update on its new electric architecture for city buses, shuttles and intercity buses, which it first announced in the autumn of 2017 at shows in the USA (APTA Expo 2017) and Belgium (Busworld Kortrijk).

The system is based on a Cummins 74kWh battery pack, designed to save space and allow for a wider range of modular configuration. The system has been “designed to be fully adaptable for today’s diesel bus models,” stated Cenk Yavuz, Turkey’s territory manager for Cummins at Busworld. The battery pack can be set up either for use as a battery electric vehicle (BEV) or as a Range Extended Electric Vehicle (REEV). When set up for use as a BEV, the system can accommodate from four up to eight, 296kWh or 592kWh Li-ion battery packs – providing the vehicle with a maximum range of 384km. The two new 18m articulated buses – essentially the same bus in versions. The Procity Low-Floor 18m articulated bus, which can carry up to 165 passengers (38 sitting and 127 standing) is now available with either diesel or CNG. The diesel version uses a Cummins intercooled 6-cylinder engine, producing up to 370hp, whereas the CNG version uses a Cummins 6-cylinder CNG engine, which produces up to 320hp and 239kW of torque. Both engines are matched with the ZF 6AP 1400B EcoLife automatic gearbox, with six forward and one reverse. The Procity has three ZF axles: ZF RL82EC front axle with gross axle weight capacity of 8,200kg; a ZF AV131 non-driven axle with gross weight capacity of 13,000kg in the mid-section, and a ZF AV133 drive portal axle at the rear. As standard, both bus versions include a manual foldable disabled ramp, automatic fire detection systems, a separate driver compartment and a rear-view camera system, with optional extras including automatic fire extinguisher systems, an LCD monitor, surveillance systems, passenger counting technology an extra fuel tank. The 3500Nm and 350Nm versions – the peak of the REEV system – are due to start operation this year. The Cummins ISB6.7 660kW engine, producing up to 182hp and 700Nm of torque. It has four heavy-duty portal axles manufactured by Turkish axle maker, Brist, including one with front wheel drive matched with an automatic gearbox with six forward gears and one reverse. The bus had a load capacity of 10,500kg and was capable of accommodating up to 107 passengers. It has six doors (three either side) to facilitate rapid boarding and disembarking with an integrated manual central ramp providing easy access for disabled passengers. The drive system draws power only in urban areas, and switches to “engine-generator” mode on longer routes – whereby the diesel powered engine is employed to generate electrical power for the vehicle – thereby providing the essentially unlimited range of a diesel engine while retaining the low-emissions and fuel economy of a battery-powered vehicle. This works because the system employs a much smaller engine than would normally be used in a similarly sized bus – the engine in the REEV system is only 2.8 litres (IFS2.8). This allows a fuel economy of 15mpg under ideal conditions. Like the BEV, the REEV system delivers a continuous torque of 1850Nm, which can increase during boosts to 3500Nm.

Both systems are due to start operation later this year. Whilst the REEV system is already being tested by the US bus manufacturer, Gillig Corporation of Hayward, California, USA in the Canadian city of Quebec, Browne estimated that June or July would see the rollout of pilot programmes for the BEV in North America.

Otokar launches Poyraz, a new 7.2m low floor city bus

Turkey - Otokar exhibited nine buses at Busworld Turkey this year, including a new addition to its range; the low-floor 7.2m Poyraz, with a capacity for 28 passengers and ideally suited for use over short to medium distances. It uses a small Cummins 3.8-litre Euro 6 compliant diesel engine with intercooler and turbocharger, capable of generating 112kW (150hp) of power and 439Nm of torque.

Basri Akgül, Otokar’s deputy general manager, said at the show the company’s exports were growing strongly with sales revenues increasing during the past year (2017) by 14% to USD149m. A recent major award was for 400 buses to the city of Bucharest, Romania, which, according to Akgül, is the largest single bus order for a Turkish bus company ever. Akgül emphasised most export sales were to Europe; for instance, Otokar’s Kent C bus range in 10m, 12m and 18.7m articulated versions, have been very successful, with exports to the UK alone being up to 204 buses last year. The Kent C articulated can carry up to 164 passengers, and uses a DAF MX11 Intercooler Turbo Diesel 6 and a ZF EcoLife 6A 1700E transmission, while the single 12mversion can carry up to 94 people. It employs the Cummins ISB6.7E6 Euro 6 206kW engine.

Another success export model has been the low-entry intercity Territo U bus. To date it has exported approximately 1700 units of the model to France, 400 to Spain and 100 to Italy. The Territo U comes in two different lengths, a 12m and a 13m model - the latter of which can accommodate up to 86 passengers. It uses a Cummins ISBE 6.7 Euro 6 engine and ZF transmission, either manual or automatic.

When asked about Otokar’s plans to develop electric buses in the future, Akgül pointed out that Otokar had been among the first manufacturers to produce electric buses - having trialled them in 26 cities five years ago. Having had limited success then, they paused development, but has resumed development recently. Otokar is currently working on a 12m electric bus, which it plans to demonstrate as a prototype of later this year. Akgül also stated demand for CNG buses was relatively low in Turkey, so there were no plans at present to develop new types of CNG buses, though he expressed interest that were modular in their current range which could be fitted with CNG engines.

BMC announces new airport bus and latest diesel/CNG-powered articulated city bus models

Izmir - Commercial and armoured vehicle builder, BMC Otomotiv Sanayi ve Ticaret AS of Izmir, Turkey introduced three new buses at this year’s show – an 18m articulated city bus with the option of either a diesel or gas engine, a 14m airport bus and the Oxford 3.5 Aprom.

The two new 18m articulated buses – essentially the same bus in versions. The Procity Low-Floor 18m articulated bus, which can carry up to 165 passengers (38 sitting and 127 standing) is now available with either diesel or CNG. The diesel version uses a Cummins intercooled 6-cylinder engine, producing up to 370hp, whereas the CNG version uses a Cummins 6-cylinder CNG engine, which produces up to 320hp and 239kW of torque. Both engines are matched with the ZF 6AP 1400B EcoLife automatic gearbox, with six forward and one reverse. The Otokar has three ZF axles: ZF RL82EC front axle with gross axle weight capacity of 8,200kg; a ZF AV131 non-driven axle with gross weight capacity of 13,000kg in the mid-section, and a ZF AV133 drive portal axle at the rear. As standard, both bus versions include a manual foldable disabled ramp, automatic fire detection systems, a separate driver compartment and a rear-view camera system, with optional extras including automatic fire extinguisher systems, an LCD monitor, surveillance systems, passenger counting technology an extra fuel tank. The 3500Nm and 350Nm versions – the peak of the REEV system – are due to start operation this year. The Cummins ISB6.7 660kW engine, producing up to 182hp and 700Nm of torque. It has four heavy-duty portal axles manufactured by Turkish axle maker, Brist, including one with front wheel drive matched with an automatic gearbox with six forward gears and one reverse. The bus had a load capacity of 10,500kg and was capable of accommodating up to 107 passengers. It has six doors (three either side) to facilitate rapid boarding and disembarking with an integrated manual central ramp providing easy access for disabled passengers. The drive system draws power only in urban areas, and switches to “engine-generator” mode on longer routes – whereby the diesel powered engine is employed to generate electrical power for the vehicle – thereby providing the essentially unlimited range of a diesel engine while retaining the low-emissions and fuel economy of a battery-powered vehicle. This works because the system employs a much smaller engine than would normally be used in a similarly sized bus – the engine in the REEV system is only 2.8 litres (IFS2.8). This allows a fuel economy of 15mpg under ideal conditions. Like the BEV, the REEV system delivers a continuous torque of 1850Nm, which can increase during boosts to 3500Nm.

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**Investment / Expansion**

**Akia to build third bus plant in Tajikistan**

Iran / Turkey / Tajikistan – Akia-Hess Otomotiv Karoseri-Imalat-San-ve-Tic-Ltd of Bursa, Turkey is building a new bus production facility in Tajikistan. Production capacity at the plant, set to open in March 2018, is expected to be around 600 buses per year and these will be mainly targeted at Asian export markets for Akia. The production plant is a joint investment between Akia and the government of Tajikistan. Akia claims exports from its two Turkish plants currently account for 85% of the company’s production in Turkey; supplying to more than 20 countries in the region.

**Export**

**Otokar wins Jordanian contract for 100 city buses in Amman**

Turkey / Jordan - Otokar Otomotiv ve Savunma Sanayi AS (Otokar) part of the Koç Group, headquartered in Istanbul, Turkey, has gained an order for 100 buses after successfully tendering to supply the Greater Amman Municipality in Jordan later this year. The order comprises 40 low floor Kent C city buses and 60 low-entry Vectio C city buses. The Amman contract was won through Al-Adiyat Al-Sareeha Latejaret Al Aleyat Co, a subsidiary of Jordanian Manaseer Group and the Otokar distributor in Jordan. Their acquisition is aimed at transforming the public transport fleet in Amman through features such as an electronic payment system and Euro 6 low emission engines. Amman has also instigated a new initiative to accelerate infrastructure works and pavement improvement projects to encourage wider bus use.

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**Performance / Market**

**Cummins’ engine sales account for over 50% of Turkish bus market**

USA / Turkey – Cummins Inc of Columbus, Indiana, USA at Busworld Turkey in Izmir last month, announced it had become the leading supplier to the Turkish bus market in 2018 – having gained a 50% market share in engine supplies for a wide range of bus sizes ranging from 7m to 18m. "Cenk Yavuz, Cummins’ territory leader in Turkey, said: "The key to Cummins success in the Turkish bus market has been to go beyond meeting low emission requirements by also bringing enhanced engine performance and improved fuel efficiency, as seen most recently with our upgraded engines for the latest Phase-C requirement of Euro 6." Since being introduced in early 2016, more than 4,000 units of its clean-diesel Euro-6 engines were in operation. Cummins’s success in Turkey has been bolstered by Turkey’s bus export success - more than 1,000 Cummins-powered buses and coaches were exported by Turkish manufacturers in 2017.

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