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PIARC Special Project

Social equity and social accessibility of transport systems

CALL FOR PROPOSALS

Deadline for submission of proposals: 6 May, 2022

1 PURPOSE AND STRATEGIC SIGNIFICANCE

1.1 Introduction

The World Road Association (PIARC) has established a Special Projects mechanism to enable it to respond outside the usual four years Technical Committee cycle to emerging issues and priorities identified by its members. This paper is a Call for Proposals to conduct the “Social equity and social accessibility” Special Project.

1.2 Definition of social equity and social accessibility in the context of this project

Social equity: road practices and policies that have ensure the consistent and systematic fair and just road transport system in the following aspects:

- Fair and just mobility to meet the needs of different road users and citizen,
- Fair and just access to road transport system,
- Fair and just allocation of the costs for road infrastructure and road transport

within a holistic approach including direct and indirect costs (toll roads, taxes, time, road safety...). A central goal of transportation is to facilitate social and economic opportunities by providing equitable levels of access to affordable and reliable transportation options based on the needs of the populations being served, particularly populations that are traditionally underserved, or which current trends in mobility could disadvantage.

Social accessibility: The attribute of transportation infrastructure and systems that enables mobility being able to be reached or obtained with affordable effort (cost, time, etc.) within different users’ context: physical, location, economic, social, gender, age...

Out of the scope: while PIARC acknowledge the importance of physical accessibility in terms of equal transport services for people with disabilities, this aspect is out of the scope for this project.

1.3 Context

It can be argued that the mission of road and transport authorities is to ensure that the provision of adequate transportation services to all citizens.

All areas are usually not served equally: major urban areas benefit from public transport services, which are usually subsidised by local and/or national governments, whereas rural areas have to rely mostly on individual road transport.

In general, transport expenditure of rural households is higher than households in big cities. This inequality was relatively well accepted since it was balanced by a lower housing expenditure in rural areas compared to urban ones.

Over the last years all countries are facing the need to decarbonize our activities (particularly

transport and housing), the need to preserve our environment and to limit the use of natural resources. The energy cost growing, they have a bigger impact on transport users captives of the individual car, therefore, the balance over the acceptability of a more expensive transport compensated by a cheaper housing, is broken.

In recent years, some measures have been developed in order to support major policy issues. However, even if the strategic issues themselves are well accepted, those practical measures have been faced with strong backlash from road users: a carbon tax on petrol (with contribute to urgent decarbonisation efforts) has led to the “yellow vest” movement in France; lower speed limits (which contribute to improving road safety) have led to major protests. Besides, some economic recovery plans that aim at compensating the effects of the COVID-19 pandemic appear to compound this as they seem to cater to the expectations of what some don't hesitate to call an urban elite. Those plans encourage the development of public transport (which is more prevalent in urban areas), of electric vehicles (which are more expensive than combustion-engine vehicles in most cases), etc. What's more, some urban areas are implementing measures that discourage or even forbid the use of older vehicles, which is seen as discriminatory by poorer road users. Lastly, the recent move to increased work from home arrangements will have various long term effects that are not well known yet. The demand for transport between home and office will evolve. The demand for housing in more rural areas will grow, which will impact mobility patterns. Housing in more rural areas will become more expensive, which will impact poorer segments of the population, etc.

In summary, the work to be conducted should address the notions of equity (are all segments of the population served fairly) and accessibility (are all geographic areas accessible to all who need it). The scope should include a clarification of equity for the purpose of the project. Some things to consider include budget per km of roads? per capita? per share of GDP?

This context will vary from country to country. The project should specifically address the reality and needs of both HIC (High Income Countries) and LMIC (Low Middle Income Countries).

1.4 Purpose of the project

As a result we are witnessing the emergence of a heated debate on how to take national (or even global) policy issues into account versus how to preserve adequate access to jobs and essential amenities for all, which is seen as a fundamental good (“right to mobility”) and as a major element of the social pillar of sustainable development. We should take into account people needs in rural and peri-urban areas and take into consideration their question “Due to ongoing transitions, what will be the offer of transportation service which will preserve my access to jobs and essential services at a cost in relation with my budget ?”. The first stage of the project will consist in analysing this type of daily mobility needs, particularly for rural and peri-urban populations. What are the essential services for which they have greater transport challenges (cost, time...)? How current transitions could break the balance with urban citizens? This analysis should be relevant for all countries no matter their income level.

Out of the scope: accessibility to essential services near the house (shopping, schools, nearby jobs, entertainment...) will not be included in this analysis when they are accessible in good conditions such as walking. Depending on the country the school could be included or not in this category.

Concerning road authorities and transportation authorities: There is a risk that long-term policy ambitions appear disconnected from the daily concerns of the population, with the latter expressing discontent through elections or protests. It is essential to build the bridge between people and policy. The second stage of the project will analyse the ongoing or projected answers by transport authorities or road agencies to the needs identified in the first stage: What are the policy measures that seem to cause problems? What would be the long term implications of not addressing such social problems? What are the best ways to handle the growing need for equity (road transport services, multimodal transport services, ride sharing services, bicycle road infrastructure, subsidies to specific users...)? How best to measure and acknowledge expectations from citizens? The work to be conducted would analyse such issues at the international level.

Out of the scope: The research will not seek to pronounce on which approach is the more suitable than the other nor will it aspire to develop a single recommendation that is meant to be applicable all countries. The research will not seek to anticipate future industry dynamics, as this would be cumbersome when we consider the global scale of the research. The research will not include a review of existing academic literature on the topic, but rather focus on case studies and anecdotal feedback received from the PIARC membership.

In order to offer a strategic perspective on the second stage, it would be needed to analyze the different business models or at least general funds flow scheme in different parts of the world. Which funds generated by road sector remain in the road sector to cover the road expenditures? Which funds go to different sectors? Which citizens or users are paying for those funds and who is benefiting from them? Benefits and costs are shared in an equitable way? The project should present different categories of business models used around the world.

The work will rely on an international case studies collection as well as on analysis with various social sciences and transport planning perspectives addressing both the realities in HIC and LIMC.

This work will establish best practices and establish recommendations for PIARC members, mostly national road administrations. It may also establish recommendations for the PIARC association, e.g. terms of reference for future Task Forces or Technical Committees, or other actions.

This research will seek to capture and analyze the current status quo in terms of how Road authorities are currently managing accessibility of their road infrastructure, whilst implementing this in the most socially equitable manner possible. Through the analysis process, the research will identify significant observation and develop a best practice guideline based on these observations.

1.5 Out of the scope

On top of the two aspects mentioned in point 1.4, the following aspects are out of the scope.

A detailed assessment of economic flows within the road sector is out of the scope. The project should focus only on economic impacts to different road users and stakeholders.

The research will not seek to anticipate future industry dynamics, as this would be cumbersome when we consider the global scale of the research. However, it should include current new aspects such as efforts for decarbonisation and its implications on social equity and social accessibility.

The research will not include an exhaustive review of existing academic literature on the topic, but rather a light and mostly practical literature review and then focus on case studies and anecdotal feedback received from the PIARC membership.

2 METHODOLOGY AND APPROACH

2.1 Analysis on current situation worldwide regarding road policies with impacts on social equity and social accessibility

Case study collection of successful and unsuccessful practices in different parts of the world, including:

- General assessment of revenues streams throughout the road sector in different parts of the world. Who is funding the road infrastructure and operation? Which funds captured by the road sector go to other sectors? What are the implications to social equity and social accessibility for different regions? What are the costs to different road users and citizens?
- Comparison of fuel taxes and its use inside and outside the road sector in different parts of the world.
- Subsidies of road transport (public or private) in urban and rural areas.
- Social protest or disagreements with transport policies, their origin and their outcomes.
- Stakeholder mapping and engagement strategies/policies to develop road infrastructure and road policies.
- Economic regulations to promote decarbonization of the road sector, how are they fund and what are their implications to social equity and social accessibility to urban, peri-urban and rural communities.

2.2 Trends of public policies regarding road social equity and social accessibility worldwide

Draw up general trends in different parts of the world regarding the road social equity and social accessibility, both in HIC and LMIC, in urban areas and rural ones.

Are they considering social equity and social accessibility? Are these issues becoming a center of interest for road administration and citizens?

Are the efforts to decarbonize the road sector challenging the social equity and social accessibility?

Has the global COVID pandemic change the road policy trends and their impacts on social equity and social accessibility? Are the economic recovery plans considering the social equity and social accessibility?

2.3 Proven policies

Draw up an inventory of the various successful and unsuccessful policies and the reasons for their success.

Case study collection of successful and unsuccessful road policies to address social equity and social accessibility both in HIC and LMIC, and urban areas and rural ones, including an analysis of the reasons for success or failure.

2.4 Income and expenditures of the road sector from a national, a Road Administration and road users perspectives

How is the business model organized around the road sector in different parts of the world from a national perspective? In USA and Canada, there are some fuel taxes allocated directly to roads, while in Europe they go to the general budget of the nation, which usually received furthermore revenues from the road sector than the investments into the road sector.

How are the same cash flows from the road administration perspective?

What about from the road users? Do they pay more or less than the real cost of the road infrastructure or road transport? Is it shared in an equitable way? Is it different for urban, peri-urban and rural populations? An international perspective should be included for these questions since it varies from country to country (countries with similar systems should be gathered).

How accessible is the road transport for different road users?

2.5 Approach

Proposals in response to this Call should use the template “Answer to the Call for Proposals for the Social equity and social accessibility PIARC Special Project”. The answer should include a description

of the approach to be taken to collect and compile the information being requested. The proposal should answer the following questions about the tenderer's approach:

1. How will the study collect international information regarding social equity and social accessibility in the road sector?
2. How will the study collect world-wide case studies, policies and business cases that deal with social equity and social accessibility?
3. How will the study identify challenges and opportunities for road policies dealing with social equity and social accessibility?
4. How the study will analyze funds flows models from a national, a road administration and road users perspectives and its impacts in different populations?
5. How will the study take into account the LMIC reality to provide specific recommendations to them on social equity and social accessibility?
6. What will be the study milestones in terms of deliverables? What will be the approach for monitoring the progress and to include the inputs from the Project Oversight Team (POT)? It is recommended to organize monthly videoconference, and to share regularly intermediate deliverables with the POT asking for feedback.
7. How the management of the project will be organized including quality assurance and quality control without taking significant resources from the project.

2.6 Options

The proposal can be structured as a core proposal plus additional options.

The bid would then include a core proposal within the proposed budget, and then some options which would be described in detail as well as priced.

If the bid is selected, PIARC would place the order for the core proposal and maybe as well for some of the options. This would be done at PIARC's discretion.

In any case, the core proposal must answer all the expectations which are presented in this call for proposals document.

3 FINAL DELIVERABLES

The final deliverables will comprise:

3.1 Report

A **report** including a literature review and a collection of case studies on road practices and policies addressing social equity and social accessibility.

The general structure of the report should be as follows (adjustments with the agreement of the POT are acceptable):

Executive Summary

1. Introduction: project background, objectives and scope.

2. Methodology and approach.
3. Description of road policies and practices with impact on social equity and social accessibility.
5. Case studies analysis from around the world.
6. Description of opportunities and challenges in this field.
7. Funds flow analysis for a national perspective, a road administration and a road user perspective including social equity and social accessibility aspects.
8. Conclusions of the study.
9. Recommendations, for road administrations, LMIC and PIARC.
10. References.
11. Appendices.

- Taking into consideration the LMIC in the study: each chapter of the report should make reference to LMIC when relevant. A chapter inside the report's conclusions with possible **specific recommendations for LMIC** should also be considered.

- The specific recommendations for road administrations and transport regulators are a key element of the report. They should be relevant for high decision makers and operators.

- The specific recommendations for PIARC could include recommendations to liaise with specific industries, take part in existing conferences and/or create a new technical committee / task force on the subject.

3.2 Dissemination material

Presentation material to present the results of the Special Project at PIARC Council meeting in October 2022 in Dakar, Senegal (final date will be defined first semester 2022).

The selected tenderer will also be invited to join the meeting physically or via videoconference. The retained option should be specified in the proposal.

3.3 Voluntary contribution to the next PIARC Congress

Voluntary contribution to the Session on the Special Projects inside the World Road Congress in Prague, 2-6 October 2023. Retained consultant will be invited to join the Session (participation is optional) and to provide inputs to the Session program. This contribution will be requested after finalizing the project and out of the project budget. So, this point is provided as information.

3.4 Intellectual property and formats

The final products will be submitted in electronic form in English, using PIARC template for Technical Report and PIARC template for PowerPoint presentations.

The report will be owned by PIARC and it will acknowledge the contribution of the external consultant.

PIARC will ensure translation into French and Spanish. In addition, they will make it available free of charge in the World Road Association's Virtual Library to ensure a large world outreach for the report.

4 KEY DATES

The proposal should also include a proposed draft of a work schedule. The schedule should identify dates or timeframes for accomplishing major milestones in the project. The work schedule will include monthly videoconference meetings and dates or timeframe for an interim product or products that allows adequate time for review and feedback prior to the final deliverable. The schedule must be completed, and final report should be delivered by September 20th, 2022, so PIARC can proceed to translation and dissemination of document in advance to participants to PIARC Council meeting foreseen in Dakar in October 2022.

These are some of the milestone to be included in the offer:

- 1st half of May 2022: Kick-off videoconference meeting.
- Intermediate milestones to be proposed by the tenderer.
- 14th of October 2022: Finalization of the report in English.
- 28th of October 2022: Finalization of Council presentation.
- Week of 7th November 2022, Presentation at PIARC Council meeting, in presence in Dakar or by virtual participation.
- 2-6 October 2023, Voluntary presentation at the World Road Congress.

5 PROPOSED BUDGET

Please provide a general budget for the project. The funding requested from PIARC should not exceed 35,000 Euros all taxes included. The budget should include a general itemization of the costs of the major work elements of the project and provisional schedule of invoicing.

Invoices will be processed only for completed and approved items, with 10% of each invoice payment to be held back until final deliverables have been accepted by the Project Oversight Team and approved by PIARC.

In line with EU regulations, the payment will take place 60 days after the acceptance of the invoice by the POT.

Since a timing delivery of the outputs is at the essence of the Special Projects mechanism, late penalties could be applied if the external consultant fails to deliver the outputs in the proposed milestones. In line with French regulations, if the delay is the contractor's responsibility, the penalties will be 1% of the budget per week of delay, with a grace period of 15 days, and up to a maximum of 5% of the budget.

6 PROPOSED EXPERTS AND INTERNATIONAL NETWORK

The proposal should also include a description of the relevant expertise that qualifies the contractor to undertake the project. Specifically:

- Please describe any past or current work projects that relate to the subject of this proposal.
- Please also identify the person or persons who will be working on this project, describing their roles and estimated contribution to the project, and providing information on their backgrounds, experience and expertise.
- Please provide information about any other international network, other than the World Road Association, from which tenderer could receive inputs.

7 PROJECT OVERSIGHT AND PROPOSALS EVALUATION

The project will be overseen by a project evaluation and steering committee called “Project Oversight Team” (POT) to select the preferred tenderer and assist in the development of the project. These experts will be drawn from PIARC membership and will include representatives from Technical Committees TC 1.1 Performance of transport administrations, TC 1.2 Planning Road Infrastructure and Transport to Economic and Social Development, TC 1.3 Finance and procurement, PIARC Strategic Planning Commission, some experts nominated by member countries and PIARC General Secretariat staff.

The POT will assess proposals and select the preferred tenderer on the basis of its assessment of:

- a) Technical approach and methodology (up to 35 points): how well tenderer address the project objectives and deliverables and how effective and resilient is the proposed approach and methodology including collecting mobility data and trends, case studies internationally and addressing the needs of different PIARC member countries, such as LMIC;
- b) Proposed work plan including intermediate milestones (up to 15 points).
- c) Value for money offered by the tenderer (up to 20 points): including the time offered by different contributors of the tenderer’s team.
- d) Experience of the proposed team on the holistic vision of mobility needs and of the road sector (up to 10 points)
- e) Experience of the proposed team on mobility needs, and the road policies and practices addressing social equity and social accessibility (up to 10 points)
- f) International experience and network of the proposed team (up to 10 points)

The POT will oversee progress of the Project, including participating in periodic calls, reviewing interim and final products. The POT will also provide any relevant information from the PIARC work to the selected tenderer (e.g., information obtained from surveys) for use in the project. In addition to review and oversight by the POT, input may also be sought from the other members of Technical Committees and the PIARC Executive Committee and Strategic Planning Commission.

8 PROPOSAL SUBMISSION

Proposals should include the elements identified in this Call for Proposals.

Answers should use the Word template “Answer to the Call for Proposals for the Road Related Data and how to use it PIARC Special Project”.

Proposals should be submitted electronically in English to the World Road Association General Secretariat at:

info@piarc.org

no later than:

6th May, 2022

For any questions, please send E-mail to info@piarc.org