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PIARC Special Project

Social equity and social accessibility of transport systems

CALL FOR PROPOSALS

Deadline for submission of proposals: 19th August 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 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

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: The concept of equity associated to mobility is very wide¹: the aspects of the equity relevant for this study are described in the following sections of this document (see ch. 2). All other aspects, although directly and indirectly related to accessibility and equity are out of the scope².

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 subsidized 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.

The recent social development, forced by economic contingency, different growth trends and patterns, associated to the effects of the Covid-19 pandemic, have changed the overall picture of accessibility, mobility and core transport policies to answer new and old needs expressed by the stakeholders.

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

¹ See *among alia*, Australian Transport Assessment and Planning (ATAP) Guidelines, *T5 Distributional (Equity) Effects*, 2016, and Department for Transport of UK, *TAG UNIT A4.2 Distributional Impact Appraisal*, 2020.

² To provide an example of aspects of great interest, but not to be considered, 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

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?”.

In summary, the work to be conducted should address a sub-set of the notions of equity, answering the question if all segments of the population are served fairly, and accessibility, answering the question of all geographic areas are accessible to all who need it

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

This project will seek to capture and analyze the current status quo in terms of how Road Authorities are currently managing social accessibility through their road infrastructure and services, whilst implementing this in the most socially equitable manner possible. Through the analysis process, the project will identify significant observations and, if possible, develop a best practice guideline based on these observations. This project will address urban areas as well as rural areas.

The project is not an in-depth academic research project that would try to develop a full operational framework. This is not what is expected, and it is not possible within the available budget. Those issues are somewhat new for PIARC, and the expectation here is to try and start better understanding them.

2 METHODOLOGY

The research questions that define the scope of the work are hereby described.

Accessibility per se (or “social accessibility”)

- Is road accessibility regularly measured in the NRAs (National Roads Administrations)?
- If it’s measured, how is this measurement organized and under which methodological background?
- How is accessibility considered in the assessment process both of new road projects and of road ordinary activity?
- What tools, strategies and policies are used to address accessibility gaps?
 - o New roads
 - o Improvement of existing roads (i.e. higher capacity)
 - o New services in the same road network (parking facilities, multimodal interchanges, dedicated lanes, ...)
 - o A combination of both
 - o Any other tool

Accessibility combined with equity (or “equity-based accessibility”)

- Is the measurement of accessibility related to a concept of equity (whatever the meaning or the concept of equity adopted by a NRA)?
- Can we refer to a concept of equity-based accessibility, as a part of the policy of a NRA?

- If we refer to specific targets of accessibility combined with equity goals, how are they pursued in different areas or regions? Which parameters/thresholds?
- Do NRAs analyze the cost of transportation (implicit and/or explicit, i.e. based on tolls) for specific groups/categories/regions?
- What are the implications to social equity and social accessibility for different regions?
- Is it possible to assess the consistency between costs associate to accessibility and benefits resulting from it?
- Is it possible to set the basis for an analysis that relates the costs to different road users and citizens?
- Can we set e list of national trends of public policies regarding road social equity and social accessibility?

Accessibility, equity and stakeholders (or “requested accessibility”)

- Given that social protest in broad sense is a critical factor in the road administration sector, can we trace a specific component of stakeholders’ platforms related to social accessibility?
- Can we identify different implications to social equity and social accessibility in association to urban, peri-urban and rural communities?
- Which are the responses put in place by the NRAs vis-à-vis the stakeholders’ platforms or claims related to social accessibility?

In terms of proposed methodology, this project will be conducted through:

- A. A literature review
- B. A collection of international case studies, through PIARC’s members and other sources
- C. An analysis of all this information in order to deliver adequate information for PIARC members

A. Literature review

The objective is to better understand the issues presented above, “set the scene” of, and to propose a common language for use within the project. This will also be used as a clear and easy-to-grasp “introduction” to those issues for a wide PIARC audience.

This will include a few examples of what data is usually needed when discussing equity questions, how such data is collected, how it is analyzed, what type of measures are put in place by road and transport administrations, and what dialogue mechanisms are put in place at the national level, among others.

B. Collection of international case studies, through PIARC’s members and other sources

The project will collect international case studies of successful and unsuccessful practices, based on the research questions defined in this chapter. This collection effort will use the “introduction” (delivered in A. above) to explain what we are trying to collect.

Those case studies will illustrate the diversity of approaches across the globe and will give examples of what can be done, which is always a very appreciated resource (whatever the topic).

It is also possible, although not mandatory, to rely on surveys, questionnaires, 1 to 1 interviews.

The project will address both HIC and LMIC.

C. An analysis of all this information in order to deliver adequate information for PIARC

In its last phase, the project will then analyze all the input that has been collected in A. and B. It will analyze:

- The complexity of the issues

- The diversity of approaches across the globe as regards what data is usually needed when discussing equity questions, how such data is collected, how it is analyzed, what type of measures are put in place by road and transport administrations, and what dialogue mechanisms are put in place at the national level, among others.
- Some common approaches, if they emerge clearly
- Possible recommendations for PIARC members (e.g. “equity is an important issue and it is recommended that all pay attention”)
- Possible recommendations for PIARC itself (e.g. “PIARC could usefully assign those topics to one of its Committees in the next Strategic Plan”)

3 STRUCTURE OF THE PROPOSAL

The proposal can be structured under two possible approaches, either of them being compliant with the tender rules:

- a) as a core, self-standing, proposal, based on the amount defined in ch. X (Budget)
- b) as a core proposal plus additional options, to be separately priced

If the bid is selected, PIARC would place the order for the core proposal. If the selected tender is based on option b), above, the additional elements of the research can be carried on at PIARC’s discretion, under a separate, additional, contract.

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

The proposal should ~~also~~ include a general 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.

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 February 28th 2023.

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

- 1st half of September 2022: Kick-off videoconference meeting.
- Intermediate milestones to be proposed by the tenderer.
- 14th February 2023: Finalization of the report in English.
- 28th February 2023: Finalization of Council presentation.

- Week of 6th March 2023, Presentation at PIARC Council meeting, virtual webinar.
- 2-6 October 2023, Voluntary presentation at the World Road Congress.

4 FINAL DELIVERABLES

4.1 General information

The final deliverables will comprise a **report** including a literature review, a collection of case studies on road practices and policies addressing the contents defined under ch. 2 presented above.

The general structure of the report should be as follows. Adjustments with the agreement of the POT (Project Oversight Team) 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.
8. Conclusions of the study.
9. Recommendations, for road administrations (HIC and LMIC) and for 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. If this is not possible due to the complexity of the issues, or to the fact that they are relatively new in a PIARC context, then this should be explained in clear terms and appropriate next steps should be presented. The specific recommendations for PIARC could include recommendations to liaise with specific industries or bodies, take part in existing conferences and/or create a new technical committee / task force on the subject.

The selected tenderer will be asked to present the results of the study in a webinar to PIARC Council members (or open webinar to anyone interested).

The retained consultant will be invited, being understood that participation is optional, to join the Session on the Special Projects inside the World Road Congress in Prague, 2-6 October 2023; in any case the selected tenderer will be invited to provide inputs to the Session program. This contribution will be requested after finalizing the project and out of the project budget.

4.2 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.

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 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 LMICs;
- 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.

7 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:

19th August 2022

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