



**Trainers' Notes**  
Rural Transport Training Materials

# Introduction Session:

## Overview of: The Key Issues in Rural Transport, and the Training Modules



**SSATP**  
Africa Transport  
Policy Program



**DFID** Department for  
International  
Development



theIDLgroup

<p><b>Learning Objectives</b></p>	<p>This session enables participants to:</p> <p><b>Technical paper</b></p> <ul style="list-style-type: none"> <li>🌐 List key constraints and issues in rural transport</li> <li>🌐 Highlight the importance of disaggregating gender issues and poverty issues for rural mobility</li> <li>🌐 Gain an overview of approaches that may be used to prioritise rural transport strategies</li> <li>🌐 Analyse relationships between key stakeholders and institutions in rural transport</li> <li>🌐 Explore gender issues in transport</li> <li>🌐 Explain the role of governments in rural transport</li> </ul>
<p><b>Rural Transport Knowledge Base papers used with this session</b></p>	<p><b>Rural Transport Knowledge Base: Introduction to the Issues.</b></p>
<p><b>Training Materials</b></p>	<p><u>Presentations</u> Introduction Presentation: Introduction to the Modules and Key Rural Transport Issues</p> <p><u>Activity Sheets</u></p> <ol style="list-style-type: none"> <li>1 Stakeholders and institutions in Rural Transport</li> <li>2 Institutional, poverty and gender issues</li> <li>3 Transport and gender analysis</li> </ol>

# Structure of Introduction Session

<i><b>Key Topics</b></i>	<i><b>Training Methods</b></i>
<b>1. Introduction</b>	<b>Presentation</b>
<b>2. Rural Transport Constraints</b>	<b>Ideas Gathering Presentation</b>
<b>3. Overview of Key Issues</b>	<b>Presentation</b>
<b>4. Assessing Priorities</b>	<b>Q &amp; A Presentation</b>
<b>5. Stakeholders and institutions in Rural Transport</b>	<b>Venn Diagram exercise Group Discussion Group Activity: Matrix Presentation</b>
<b>6. Role of Government</b>	<b>Presentation with discussion</b>
<b>7. Summary of key issues</b>	<b>Presentation</b>
<b>8. The Training Modules</b>	<b>Presentation</b>

This session has only one part and is based on:

## Technical Paper: Introduction to the Rural Transport Knowledge Base


This session differs from all other session in that it serves to set the scene for a course or workshop on rural transport issues. This session provides an introduction to the training materials. It explains the layout of the training materials, and sets each Training Module and the sessions within each of the Modules into context. It also provides an overview of the key issues of rural development, and which issues will be addressed in each Module.

Trainers may elect to deliver a course/workshop that explore specific aspects of rural transport and so may choose to use just one or two of the Training Modules. Each Training Module is designed to stand alone. However, by way of introduction to a course, trainers may use the *Introduction Session of Module 1* (i.e. this session) at the beginning of a course that makes use of any or all of the Training Modules.

This session is designed to follow on from the usual introduction activities that take place in first part of most courses/workshops – i.e. welcome of participants, eliciting participants' expectations, timetable, and other administrative matters pertaining to the event.

# Introduction Session. Trainers' Notes

## 1. Introduction to the Modules

<i>Training Methods</i>	<i>Content</i>	<i>Materials</i>
<p><b>Presentation</b></p> 	<p><b>Overview of the session</b></p> <p>Introduce the first part of session by explaining the learning objectives and session structure.</p> <p>This session provides a broad overview of the issues involved in Rural Transport and serves to set the scene for the future debate during the course. Participants are provided the opportunity to raise and explore issues of interest. The session also outlines the Modules covered in this series of training materials.</p> <p>Explain the structure of this session:</p> <p><b>Key Points</b></p> <ul style="list-style-type: none"> <li>🌀 Introduction to the session</li> <li>🌀 Rural transport constraints</li> <li>🌀 Overview of key issues</li> <li>🌀 Assessing priorities for addressing issues</li> <li>🌀 Key stakeholders and institutions in rural transport</li> <li>🌀 Transport and gender analysis</li> <li>🌀 Role of government</li> <li>🌀 Summary of the key issues in Rural Transport</li> <li>🌀 Overview of the Training Modules</li> </ul>	<p>Presentation <i>Introduction</i> Slides 1-3</p>

## Presentation



### Brief introduction to the Training Modules

Introduce the training materials, explaining how they relate to the Rural Transport Knowledge Base and provide an overview of each of the Training Modules.


#### Key Points




- ③ The source of the Training Modules
  - ✓ these are based on the Rural Transport Knowledge Base
- ③ Training approach and methods used with the Training Materials
  - ✓ sessions are participatory
  - ✓ sessions build on the existing knowledge and experience of participants
- ③ Supporting materials available that will be used in this course
  - ✓ the technical papers and case studies from the Rural Transport Knowledge Base

Explain to participants that the Training Modules will be discussed in more detail in the last section of this session, once the key issues facing us in rural transport at this time have been explored. This allows us to set the Training Modules in a broader context.

Presentation  
*Introduction*  
Slide 4


## 2. Rural Transport Constraints

Training Methods	Content	Materials
<p><b>Ideas Gathering</b></p> 	<p>The aim of this part of the session is to open the debate on Rural Transport by examining all the issues that participants are aware of in relation to rural transport.</p> <p>Explore the constraints to Rural Transport, with the aim of gathering a wide range of ideas and opinions as possible from the participants.</p> <ul style="list-style-type: none"> <li>④ Write the question on white board</li> </ul> <p><i>What are the constraints facing Rural Transport?</i></p> <ul style="list-style-type: none"> <li>④ Give each person a set of post-its and ask them to note one constraint on one post-it. Each participant may make as many contributions as they wish.</li> <li>④ Put all the post-its on a white board.</li> <li>④ When all points have been made, group the post-its under common themes through discussion with participants. The groupings should be based on the opinions of the participants.</li> </ul> <p><b>Continued</b></p>	<p>Presentation <i>Introduction</i> Slide 5</p> <p>Post-its White board</p>

Training Methods	Content	Materials
	<p><i>... Continued</i></p> <ul style="list-style-type: none"> <li>  <b>Suggested themes include:</b> <ul style="list-style-type: none"> <li>✓ Socio-economic (including gender, livelihoods and poverty issues)</li> <li>✓ Environmental issues</li> <li>✓ Non-transport interventions (access to facilities e.g. health)</li> <li>✓ Transport infrastructure &amp; modes of transport (e.g. IMTs)</li> <li>✓ Policy and institutional issues (including governance issues and whether the poor have a voice in determining transport interventions)</li> <li>✓ Financing and management of transport interventions (e.g. labour-based approaches)</li> </ul> </li> <li>  Summarise the discussions by emphasising the considerable range of constraints. The key learning points will be discussed below.         </li> </ul>	
<p><b>Presentation</b></p> 	<p>Building on the discussions above, summarise the broad range of constraints to rural transport, by using the list on Power Point slides to complement what has been suggested by participants.</p> <p>Explain that the Training Modules, through courses and workshops, aim to provide a forum by which these issues can be analysed and strategies developed with participants for ways forward.</p>	<p>Presentation <i>Introduction</i> Slides 6 - 7</p>





### 3. Overview of key issues








Training Methods	Content	Materials
<p><b>Presentation</b></p> 	<p>This section builds on the list of constraints highlighted in the previous section. Expand on the points raised above and provide a holistic overview of the key issues facing us in rural transport today.</p> <p><b>Key Points:</b></p> <p><b>A wider perspective is needed</b></p> <ul style="list-style-type: none"> <li>Until recently governments and aid donors believed that rural transport problems could most effectively be addressed through investments in road infrastructure. It is now widely accepted that the situation is much more complex.</li> </ul> <p><b>Poverty, livelihoods and transport</b></p> <ul style="list-style-type: none"> <li>It's not just about improving access through more roads: many other issues must be considered e.g. <ul style="list-style-type: none"> <li>✓ What role does transport play in peoples' livelihoods, especially the poor in rural areas?</li> <li>✓ What modes of transport are most appropriate for the poor?</li> <li>✓ Who has access to various modes of transport (women, the poor)?</li> </ul> </li> </ul> <p><b>Continued</b></p>	<p>Presentation <i>Introduction</i> Slide 8</p>

Training Methods	Content	Materials
	<p><i>... Continued</i></p> <p><b>Policies and institutions</b></p> <ul style="list-style-type: none"> <li>☉ A combination of policies and measures are needed to address constraints to access and mobility – e.g.             <ul style="list-style-type: none"> <li>✓ Which aspects of rural infrastructure should public expenditure focus on? Tarmac roads or upgrading dirt tracks, for example?</li> <li>✓ What institutions and legislation need to be set in place to encourage private sector investment or support the establishment of small-scale road contractors?</li> </ul> </li> </ul> <p><b>Gender perspectives in rural transport</b></p> <ul style="list-style-type: none"> <li>☉ Gender issues play such an important role in the provision of and access to transport services that they must be afforded a distinct place in the debate.             <ul style="list-style-type: none"> <li>✓ The burden of poor transport services often falls disproportionately on women. This in turn affects the household economy and vulnerability of livelihoods.</li> <li>✓ Experience has shown that the mobility patterns and transport needs of men and women can differ greatly, and are often linked to their <i>gender roles</i> e.g. the burden of collecting water and firewood.</li> <li>✓ Many transport interventions have neglected the needs of women, who may require modes of transport that for example, allow them to transport crops from the field, and goods to local markets.</li> <li>✓ IMTs have not necessarily been designed specifically for women, both culturally and physically.</li> </ul> </li> </ul>	


Training Methods	Content	Materials
	<p><i>... Continued</i></p> <p><b>Financing &amp; managing rural transport</b></p> <ul style="list-style-type: none"> <li>🌀 How can we best finance and manage rural transport interventions? <ul style="list-style-type: none"> <li>✓ When should labour based approaches be used?</li> <li>✓ How do we prioritise which transport interventions should be funded – e.g. is cost-benefit analysis most appropriate for remote areas using labour-based approaches?</li> </ul> </li> </ul> <p><b>Rural Mobility</b></p> <ul style="list-style-type: none"> <li>🌀 It's not simply about access to transport services and infrastructure but about <i>Rural Mobility</i> – a broader more holistic perspective can be gained by looking at the issues in the context of <i>mobility</i> <ul style="list-style-type: none"> <li>✓ What are the travel patterns of rural households? How does this affect their travel requirements? What are the best ways to meet these requirements?</li> <li>✓ Conventional verses IMTs</li> </ul> </li> </ul> <p><b>Wider range transport modes &amp; infrastructure</b></p> <ul style="list-style-type: none"> <li>🌀 A wide range of transport modes and infrastructure are required such as development of IMT's, and upgrading paths to dirt tracks to allow farmers in remote areas to access markets.</li> </ul> <p><b>Alternative non-transport solutions</b></p> <ul style="list-style-type: none"> <li>🌀 Consider alternative “non-transport” interventions including location of facilities and services nearer to rural communities, which may be more cost effective and have greater impact on rural transport demand.</li> </ul>	



## 4. Assessing Priorities


Training Methods	Content	Materials
<p><b>Q &amp; A</b></p> 	<ul style="list-style-type: none"> <li>④ Facilitate a discussion on the range of approaches that are needed to develop an appropriate rural transport strategy. Begin discussions by asking:               <ol style="list-style-type: none"> <li>1. <i>What are the various approaches available to explore and prioritise transport issues?</i></li> <li>2. <i>How may various strategies be prioritised? Based on what criteria?</i></li> </ol> </li> <li>④ Note points made by participants on flip chart. The key learning points are discussed below.</li> </ul>	<p>Flip chart, pens</p>
<p><b>Presentation</b></p> 	<p>Building on the discussions above, explain the approaches available to address transport issues and how these strategies may be prioritised.</p> <p><b>Key Points:</b></p> <p><b>Approaches to transport issues</b></p> <ul style="list-style-type: none"> <li>④ Participatory appraisal techniques, participatory research and surveys, workshops, participatory mapping exercises and so on</li> <li>④ Consultation with opinion leaders, chiefs, the district administration, transporters, market traders</li> <li>④ Existing district and regional development plans</li> </ul> <p><b>Continued</b></p>	<p>Presentation <i>Introduction</i> Slides 9 - 10</p>

Training Methods	Content	Materials
	<p><b>...Continued</b></p> <ul style="list-style-type: none"> <li>  Livelihoods Analysis:           <ul style="list-style-type: none"> <li>✓ identifies ways in which a measure will affect the local community</li> <li>✓ provides a framework for understanding the effect of proposed changes on rural peoples livelihoods</li> <li>✓ focuses on how the local community use and develops its social, human, financial, natural and physical asset structure</li> </ul> </li> <li>  Transport and communications interact with many dimensions of peoples livelihoods         </li> <li>  Substantial benefits could accrue:           <ul style="list-style-type: none"> <li>✓ if the labour involved in collecting water, firewood, taking crops to market could be reduced</li> <li>✓ rural transport could be improved and transport costs of taking produce to large urban centres reduced.</li> </ul> </li> </ul> <p><b>How these strategies may be prioritised</b></p> <ul style="list-style-type: none"> <li>  A quantitative analysis of costs and benefits         </li> <li>  An analysis of levels of productivity, man power utilisation         </li> <li>  An analysis of costs and tariffs         </li> <li>  Comparative analysis of costs and conditions in different countries.         </li> </ul>	


## 5. Stakeholders and Institutions in Rural Transport


Training Methods	Content	Materials
<p><b>Venn Diagram In Groups</b></p> 	<p>The purpose of this activity is to explore the relationships between the stakeholders involved in rural transport.</p> <ul style="list-style-type: none"> <li>④ Divide the participants into small groups (see Trainers' Note below).</li> <li>④ Give each group Activity Sheet 1, and explain the procedures for developing a Venn diagram.</li> <li>④ List all the stakeholders involved in rural transport.</li> <li>④ Write the name of each stakeholder on a circular piece of card.</li> <li>④ Rank the stakeholders in order of importance.</li> <li>④ Arrange the cards on a sheet of flip chart paper, with cards overlapping where there is <b>contact</b> between stakeholders (the more contact there is the more the cards should overlap).</li> <li>④ Glue the cards to the flip chart sheet when the group has agreed on a final set of relationships.</li> </ul> <p><b>Continued ...</b></p>	<p>Presentation <i>Introduction</i> Slide 11</p> <p>Activity sheet 1</p> <p>Circular pieces of card, glue, marker pens</p> <p>Flip chart</p>

Training Methods	Content	Materials
	<p><b>... Continued</b></p> <ul style="list-style-type: none"> <li>  When the groups have agreed the final set of relationships, ask them to discuss the following:           <ul style="list-style-type: none"> <li>A. <i>What is the reasoning behind these relationships? Who controls the provision of and access to transport?</i></li> <li>B. <i>Do some stakeholders have less access to transport services than others? Why is this? How does this knowledge affect the way we design transport interventions?</i></li> <li>C. <i>What is revealed by this sort of participatory technique that might be missed by a simple quantitative survey?</i></li> </ul> </li> <li>  Ask each group to present their findings to the plenary, and facilitate a discussion on the key issues raised.         </li> </ul>	
	<p><b><u>Trainers' Note:</u></b></p> <p><i>This exercise may be carried out for a particular country, district, or village with which participants are familiar.</i></p> <p><i>An alternative for this exercise: if participants come from a range of stakeholder groups then they may be divided into groups according to their role as key players e.g. government staff in one group, NGOs in another group, Highway Authorities in another group, and so on. The resulting Venn Diagrams may then be compared to illustrate different opinions and levels of knowledge between stakeholders.</i></p>	

Training Methods	Content	Materials
<p><b>Presentation</b></p> 	<p>Building on the Venn Diagram activity above, and using the slides, summarise the key stakeholders involved in rural transport. Bring in additional points made by participants.</p> <p><b>Key Points:</b></p> <ul style="list-style-type: none"> <li>⦿ Rural Households, women, men, poor, wealthy, landless, Village Communities, Indigenous institutions</li> <li>⦿ District, Regional and National Government</li> <li>⦿ Road and Highway Authorities</li> <li>⦿ Road construction and maintenance contractors, commercial transport operators and unions</li> <li>⦿ Commercial garages and mechanics, small market wholesalers and retailers</li> <li>⦿ Agricultural extension services, health and education services</li> <li>⦿ Large scale farms, agricultural marketing and processing organisations</li> <li>⦿ The police (traffic)</li> <li>⦿ Non governmental organisations (NGOs)</li> <li>⦿ All these stakeholders have their own vested interests and roles in rural transport</li> </ul>	<p>Presentation <i>Introduction</i> Slides 12 - 13</p>






Training Methods	Content	Materials
<p><b>Group Discussion</b></p> 	<p><b>Links and relationships between stakeholders</b></p> <p>The purpose of this activity is to explore the relationships between stakeholders in more depth, focussing in particular on the institutional issues and ways in which the poor are affected.</p> <ul style="list-style-type: none"> <li>🕒 Ask participants to work in the same groups as the previous activity. Give them Activity Sheet 2, and using the Venn Diagrams produced, ask them to discuss: <ul style="list-style-type: none"> <li>A. <i>What are the institutional factors that affect the relationship between the key stakeholders?</i></li> <li>B. <i>How may the poor be disproportionately affected?</i></li> <li>C. <i>How may women be disproportionately affected?</i></li> </ul> </li> <li>🕒 Ask each group to present their findings to the plenary</li> <li>🕒 Facilitate a discussion on the key issues raised. (See Trainers' Note below)</li> </ul>	<p>Presentation <i>Introduction</i> Slide 14</p> <p>Activity Sheet 2</p> <p>Venn Diagrams from previous exercise.</p> <p>Flip chart and pens.</p>
	<p><b><u>Trainers' Note</u></b></p> <p><i>There are no right and wrong answers to these questions. However, participants should be encouraged to consider a wide range of issues from technical, social, economic, institutional, cultural, governance and political. Encourage participants to look at issues from a micro (village) level up to a macro (national and international) level.</i></p>	

Training Methods	Content	Materials
<p><b>Gender Analysis</b></p> 	<h3>Transport and Gender Issues</h3> <p>The purpose of this exercise is to explore household transport activities from a gender, and adult/child, perspective. We will examine activities involving transport and the access to transport facilities e.g. motorised vehicles, bicycles etc. This exercise also allows for an analysis of division of labour for transport activities.</p> <p>Participants will need to have information and knowledge of a particular household's transport activities to carry out this exercise.</p> <ul style="list-style-type: none"> <li>④ Divide the participants into groups and give each group Activity Sheet 3.</li> <li>④ Ask each group to: <ul style="list-style-type: none"> <li>≈ list household activities involving transport</li> <li>≈ prepare a <i>Transport Matrix</i> for a given household on flip chart</li> </ul> </li> <li>④ Ask the groups to discuss: <ul style="list-style-type: none"> <li>A. <i>What are the reasons for the gender differences in demand for transport and the time taken by men and women to carry out transport tasks?</i></li> <li>B. <i>What are the implications of these gender differences for the way we address rural mobility issues, and design transport services and infrastructure?</i></li> </ul> </li> <li>④ Ask each group to present their findings to the plenary.</li> <li>④ Facilitate a discussion on the Key Points arising.</li> </ul> <p><b>See trainer's note below.</b></p>	<p>Presentation <i>Introduction</i> Slide 15</p> <p>Flip chart, pens</p> <p>Activity Sheet 3</p>


Training Methods	Content	Materials
	<p><b><u>Trainers' Note</u></b></p> <p><i>Key learning points should include issues such as the different roles and tasks of men and women and how this may affect their transport problems and needs. These issues are also explored in detail in Module 5 of these training materials.</i></p> <p><i>Emphasise the importance of separating out the demand for transport services and rural mobility issues, for men and for women. If transport interventions focus purely on the needs of say men, then this not only has an impact on the work burden of women as individuals but also on the household and family in a number of ways – e.g. household economy (through lack of access to markets), food security (timeliness of harvest and moving crops into storage), education of girls (spending time collecting firewood and water instead of being at school), family health (access to clinics) and so on. These issues are related to the 'gender roles' of men and women.</i></p> <p><i>The gender differences in the demand for and supply of transport services form a recurrent theme throughout the Rural Transport Training Modules.</i></p>	









## 6. Role of Government

Training Methods	Content	Materials
<p><b>Presentation with Discussion</b></p> 	<p>Facilitate a discussion on the role of the government in relation to the key actors. Draw on the experiences of the participants.</p> <p>Facilitate debate by asking questions like:            What has been the role of government in rural transport in the countries in which you are working?            How may government best serve the transport needs of rural communities?</p> <p><b>Key Points:</b></p> <ul style="list-style-type: none"> <li>④ The ability of government to influence and control actors is variable</li> <li>④ Governments can influence actors through policy</li> <li>④ Governments have traditionally determined investment and maintenance</li> <li>④ Governments must be involved where there are: -               <ul style="list-style-type: none"> <li>✓ few feedback mechanisms between costs and benefits</li> <li>✓ externalities e.g. road safety and health</li> <li>✓ economies of scale</li> <li>✓ new technologies e.g. new forms of IMT</li> <li>✓ monopoly practise that reduce the effectiveness of markets</li> </ul> </li> </ul> <p><b>Continued...</b></p>	<p>Presentation  <i>Introduction</i>            Slide 16</p>


<i>Training Methods</i>	<i>Content</i>	<i>Materials</i>
	<p><b>... Continued</b></p> <ul style="list-style-type: none"> <li>  Government is less involved with: -           <ul style="list-style-type: none"> <li>✓ the actions of households and commercial transporters</li> <li>✓ the actions of market wholesalers and retailers</li> </ul> </li> <li>  The market, rather than government, is the key mechanism that governs commercial vehicle transport operators.           </li> </ul>	

## 7. Summary of key issues

Training Methods	Content	Materials
<p><b>Presentation</b></p> 	<p>This part of the session summarises all the key issues in rural transport discussed so far. The list of issues depends on what has been raised by participants, and the slides provided with these training materials do not necessarily provide a definitive list. This section should feed into the next section that outlines the Training Modules.</p> <p>Summarise the key issues using the slides and bringing in additional issues mentioned by participants. Some issues are cross-cutting and referred to in all of the Training Modules, while others are dealt with in one particular Module.</p> <p><b>Key Points:</b></p> <ul style="list-style-type: none"> <li>③ Policies and institutional frameworks <ul style="list-style-type: none"> <li>✓ Training Modules 1 and 2</li> </ul> </li> <li>③ Frameworks for developing transport services, design and management of rural transport interventions <ul style="list-style-type: none"> <li>✓ Training Modules 2 and 3</li> </ul> </li> <li>③ Role of Government: policy and institutional reforms, legislation, financing works – these roles need to be clearly defined <ul style="list-style-type: none"> <li>✓ mainly Training Modules 1 and 2</li> </ul> </li> <li>③ Participatory tools for exploring rural transport issues with communities and other stakeholders <ul style="list-style-type: none"> <li>✓ Training Module 2</li> </ul> </li> </ul> <p><b>Continued ...</b></p>	<p>Presentation <i>Introduction</i> Slides 17 - 19</p>

Training Methods	Content	Materials
	<p>... <b>Continued</b></p> <ul style="list-style-type: none"> <li>  Prioritising investment of resources, economic appraisal methods            ✓ Training Module 2         </li> <li>  Financing rural transport, public and private sector investment            ✓ Training Module 3         </li> <li>  Rural Mobility            ✓ Training Module 4         </li> <li>  Issues of <i>access to services</i>, marketing, modes of transport - conventional and IMTs            ✓ Training Module 4         </li> <li>  Gender            ✓ cross-cutting in all Training Modules, but specific details in Module 5         </li> <li>  Social and environmental issues            ✓ Training Module 5         </li> <li>  Role of transport issues in poverty and livelihoods            ✓ cross-cutting in all Training Modules, but specific details of Sustainable Livelihoods in Module 5         </li> <li>  Stakeholders have different interests with regard to rural transport, and there may be tension between these            ✓ cross-cutting in all Training Modules         </li> </ul>	

## 8. The Training Modules

<i>Training Methods</i>	<i>Content</i>	<i>Materials</i>
<p><b>Presentation</b></p> 	<p>The aim of this section is to provide an outline of the Training Modules and explain how the issues raised above will be explored.</p> <p>Describe the issues to be explored in each Module and the outline of each session.</p> <p><b>Key Points:</b></p> <ul style="list-style-type: none"> <li>☉ List the Training Module titles</li> <li>☉ Explain what issues each Training Module explores</li> <li>☉ List the Session titles in each Training Module</li> </ul> <p>Explain to participants which Training Module (s) or specific sessions will be used for their particular course/workshop.</p> <p>Trainers may elect to omit discussion on certain slides about Training Modules they will not be using.</p> <p>Summarise the introduction session and link into the next session of the course/workshop.</p>	<p>Presentation <i>Introduction</i> Slides 20 - 31</p>