

MODULE 9 - Generic Terms of Reference for an Intermediate Means of Transport study

Abstract:

Module 9 gives an example of a terms of reference, which can be applied in a variety of IMT studies. It sets up a framework for looking at rural transport services (RTS) and intermediate transport (IMT) in the general country context, determining the objective of the services, setting up a scope of work for the study, and other tasks related to a RTS / IMT study.

I. Background

This TOR focuses on a survey of Rural Transport Services (RTS) in terms of the use of IMTs in a particular country or region. It sets out on a situation analysis, including an assessment of the demand for RTS, tries to identify constraints to the provision of RTS and discusses realistic policies and strategies to mitigate these constraints. It ensures that Intermediate Means of Transport (IMT) projects and programs are gender sensitive. Furthermore it analyses the actual utilization of IMTs and possible ways of promotion of their availability and affordability to the rural poor, particularly women.

II. Country Context

(The text below needs to be adjusted to the particular country/area circumstances)

The lack of transport services is frequently identified as a major constraint to rural development. Generally, planners have focused on improvements to transport infrastructure, usually roads, as the principal remedy, on the assumption that private initiative would respond to the resultant demand for transport services. However, there are often problems that hinder the development of this private initiative and, therefore, the supply and quality of transport services is often unsatisfactory. Evidence from Bank projects show that good quality roads do not necessary mean good transport services. Indeed, it is common to see quality roads mainly used by pedestrian and/or non-motorized means of transport (NMT) in developing countries.

Government policy and regulation of the market for transport services as well as transporters' associations and unions might impact negatively on the provision of RTS. Often an urban/rural imbalance can be observed. Queuing for loads at lorry parks on certain urban or inter-urban routes with a scarcity of services on rural routes is common. A World Bank Study in Africa found that despite decreased government control of transport services, private cartels have taken its place and lead to significantly distorted transport markets. This combined with other factors leads to three to five times higher transport charges in Africa as compared to Asia. Reductions in charges will directly impact on the effective demand for transport services from rural communities.

III. Objective of the Services

The principal objective of the study on Rural Transport Services and Intermediate Means of Transport is to take stock of the country (or area) situation, to outline options for considerations for reform, as well as to provide tools to policy makers, task managers, program officers, community planners, NGOs etc. to enhance RTS and the provision of IMTs. They need to know what works, where to start, how to do it and what are the pitfalls.

The study, to be prepared under these TORs, must provide a "nuts and bolts" approach for policy makers, and must provide practical operational advice for policy implementers. The study should be presented in a manner most useful to its particular audience. It must be practical, concise and reader-friendly and should have a clear policy and public sector orientation.

The study should guide project preparation, execution, and supervision by clearly identifying the steps and variables involved, and specify the questions that should be asked and key issues that should be addressed throughout the project cycle. It needs to identify which stages of project development are critical to the integration of gender issues and what and how to proceed to ensure gender equity.

IV. Scope of Work

The study should succinctly summarize the rationale and justification for RTS development and for IMT programs, review their contribution to the objectives of increasing agricultural productivity, industrial growth, potential for increased tourism and associated services and rural welfare in general and in particular how it impacts each of the sexes. It needs to point to specific situations where rural transport services development should be considered as part of a broader effort to increase economic productivity and to facilitate access to economic and social services on a gender disaggregated basis.

Furthermore it should outline the emerging lessons from experience with rural transport services and IMT development programs and should indicate what we know about the conditions for their success (good practices, "to-do's and not-to-do's"). This will include assessing the characteristics and importance of a conducive policy environment; and explicitly address the institutional arrangements for implementation--the relationship between central and local government, NGOs, private sector actors, the need for TA support and supervision, and the differences in need of both men and women.

The study should find a new way of looking at the issues of transport services in rural areas. Since not every village will have motorable road access at all time, a focal point (terminal) on a motorable road, with eventually a storage capacity, could be used as boarding place for a group of villages. This arrangement means that the study must consider the linkages between motorized and non-motorized transport, as well as the transport networks, services provided and mobility level and needs of both genders.

The study needs, in short, to survey what is going on the field of rural transport services and what worked or did not for men and women separately and together, and how to build on what worked. It will rely on examples and lessons from best practices to provide an understanding of key design parameters and conditions for success. The paper will draw on the existing pool of knowledge of development and promotion of rural transport services and IMTs, e.g., studies and, most importantly, the experience of both completed and ongoing projects. It should not repeat technical and design specific material available from other sources, but should provide appropriate references.

In particular the study will:

- survey (by gender) the policy, regulatory, institutional and market environment for the provision of RTS and NMT, including taxation, availability of credit facilities, existence of competition restricting transporters' unions, etc. and will make recommendations as to realistic improvements in particular regarding appropriate taxation and the creation of a more competitive and less regulated environment

- survey (by gender) the RTS routes in the country/area including frequency, cost (per km for passengers and freight), type of vehicles used, including technical specification and assessment of suitability, and condition and passability of the routes
- analyze the operating environment of RTS providers, including licensing arrangements, fees, operating costs, training needs of operators, social environment (who uses them, who owns and controls the RTS), safety and pollution aspects of the vehicles, and their level of concern for women's needs.
- analyze the availability, affordability of NMT by the rural poor, in particular women, including cost breakdown of NMT, density of ownership (who owns NMT and for what are they used), production and maintenance facilities, availability of spare parts, etc.
- outline options and alternative approaches to rural transport services and to IMT promotion and demonstration for both men and women; the promotion would identify factors necessary for the introduction of new technology which will lead to an improved framework for the selection of rural vehicles
- review the process for identification, piloting and possible expansion of rural transport services and of IMT programs addressing the nuts and bolts of community participation, surveys, program design, respective role of the public and the private sector, involvement of NGOs/associations and donors, and so forth, as well as impacting policies and the institutional design of the component; assess the experience and potential for promoting rural transport services and IMT use among women, considering among other factors cultural and financial constraints and traditional women's tasks;
- detail simple monitoring and evaluation arrangements for RTS and IMT development programs making them gender specific; and

provide guidance on appropriate levels of expenditure for rural transport services development and for IMT programs in relation to key gender parameters (population served, number of farming households, total tonnage handled, etc.). The study should also address the issue of minimum service levels including the subsidization of these services. The first task of the consultant will be to draw up an initiating memorandum for the paper specifying the approach of the paper including the issues that will be addressed, the methodology that will be recommended and the resources that will be assigned to the task. The paper should inter alia (i) succinctly summarize the rationale and justification for IMT programs and review their contribution to the objectives of increasing women's agricultural productivity and rural welfare; (ii) outline the emerging lessons from experience with IMT programs and indicate what we know about the conditions for their success, and point to specific situations where such programs should be considered as part of a broader effort to increase agricultural productivity and to facilitate access to economic and social services; (iii) review the process for identification, piloting and possible expansion of IMT programs addressing the nuts and bolts of community participation, surveys, program design, etc. taking women into active consideration; (iv) outline options and alternative approaches to IMT promotion and demonstration among women; (v) outline monitoring and evaluation arrangements for IMT programs as they impact women users; (vi) provide guidance on appropriate levels of expenditure for IMT and rural transport programs in relations to key gender parameters (population served, number of farming households, total tonnage handled, etc.) and review expenditure issues related to overhead and program management as they relate to total costs and overall program scope.

V. Estimated Consultant's Input

(This will depend on the size of the survey area)

It is expected that the study would require a total of twelve person-weeks. The team should include a Director (a rural transport services specialist with particular experience in gender issues of at least ten years) for about three weeks, Associates for about seven weeks one of which would be a gender transport specialist, and a Rural Finance Specialist (with relevant experience of at least five years) for about two weeks. The Director should visit the Task Team in

Washington prior to commencement of the study to discuss the initiating memorandum and develop the work program for the study.

VI. Study Management

The consultant will report to the Client. The consultant will present the initiating memorandum to the Client and the Task Team Leader before starting the substantive part of the work. The preliminary and final reports will be reviewed by the Client and the Task Team Leader. Comments will also be sought from professionals and institutions with experience in transport, planning and rural development.

VII. Reporting Requirements

A preliminary report must be produced one month after commencement of the study. A draft final report should be produced two weeks after completion of services. The final report must be provided two weeks after reception of feedback. The consultant will produce X copies of each report as well as a diskette of the final report; preferably using (Name Word Processing Software).