

COST Action TU1209 - Transport Equity Analysis (TEA):  
assessment and integration of equity criteria in transportation planning



## EXECUTIVE SUMMARY

### Guidelines & Roadmap for EU equity planning

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# EXECUTIVE SUMMARY

## Guidelines & Roadmap for equity planning

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The aim of these guidelines is to provide practitioners and urban planners a step by step process for assessing transportation project/policy behind an equity point of view.

### Scope: DEVELOPING AND IMPLEMENTING EQUITY IN TRANSPORT PLANNING

While transport evaluation remains significant, equity assessment in transport planning is not sufficient and needs to be better understood and examined in terms of accessibility, mobility, and health effects. This broader focus is needed, among others, because of the emergence of the weaknesses of the current planning tools for transport infrastructures and services in incorporating equity considerations and the complexity in identifying the impacts of travel behaviours on society, environment, and equity (Lucas et al., 2016). Discussions during the workshops, core groups meetings, and Training school were dedicated to analysing mobility and transport policies in the light of equity in transport, i.e. with a focus on evaluating their capacity to address transport-related exclusion of various population groups.

This executive summary will present basic approaches in transport planning that consider different types of access to transport services and everyday activities, addressing equity and social exclusion in transport.

Within this framework the summary is oriented to:

- 1) Define equity in the context of transport (i.e. definition)
- 2) Highlight the importance of equity for transport appraisal
- 3) To help embed equity assessment into future transport policies and investments, accounting for equity and needs of people.

The basic definition of equity used here is ‘the distribution of benefits and costs over members of society’ (e.g., Boucher and Kelly, 1998; Miller, 1999). Based on this definition, three key components of equity in transport can be distinguished: (1) the benefits and costs that are being distributed; (2) the population groups over which benefits and costs are distributed; and (3) the distributive principle that determines whether a particular distribution is “morally proper” and “socially acceptable”.

The main challenge for the assessment of equity in the domain of transportation is to define and operationalize costs and benefits and the distributive principle. The definition and operationalization of population groups are carried out in many domains of research and policy, including transportation. However, while the diverse impacts of transport policies and investments on different population groups have long been recognized, understanding and explicitly assessing these impacts as part of an equitable and inclusive perspective requires further developments.

As the expected mobility costs increase (fuel price, congestion charging, public transport budget constraints, etc.), the related various impacts of transport policies and their distribution are becoming even more important (Hengel et al., 1998). In addition, the high level of mobility has created land use patterns that are difficult to navigate for non-motorized transport users (Geurs and van Wee, 2004). This issue has recently gained attention due to the ageing of the population and the related growth in the number of people that are no longer able to drive a car or use a bike (European Commission, 2011).

These last two issues, which have different impacts of different population groups, have contributed to the realization that equity should play a constitutive role in transport provision, similarly to the role it plays in education and health care, where equity considerations form a part of everyday decision-making.

The guidelines for equity in transport focus on the process of assessing equity for transportation project/policy. They need interpretation according to the context of the project/policy, the intervention area and the special characteristics of it. This can lead to implementation that are different from those described in this document.

How equity is defined and measured can significantly influence analysis results. A specific alternative solution may seem equitable when evaluated one way but inequitable when evaluated another. It is advised to consider various perspectives and impacts. There is no single correct methodology. A planning process should reflect each community's concerns and priorities, so public engagement and people participation is important for equity analysis (Litman, 2002).

#### Equity goals:

- Fair allocation of transport resources
- Equal opportunity to be mobile and have access to key `life chance` activities
- Reducing adverse effects of transport system – including pollution, accidents and social exclusion

The following diagram shows the overall recommended process for considering equity in transport planning and investment policy. It synthesises the planning cycle for an equitable urban mobility plan, which activities are described in the GUIDELINES & ROADMAP FOR EU EQUITY PLANNING report.

# PLANNING CYCLE FOR AN EQUITABLE URBAN MOBILITY PLAN

