ENHANCING AND SUSTAINING RURAL ACCESSIBILITY

IN OIC MEMBER COUNTRIES

SURVEY

COMCEC

2025 | COMCEC COORDINATION OFFICE

Outline

- Introduction
- Survey Methodology
- Respondent Profile
- Current State of Rural Transport and Accessibility
- Technology Pathways, Integration, and Barriers
- Sustainability, Social Needs, and Trade-offs
- Policy Frameworks, Governance, and Financing
- Stakeholder Priorities
- Key Issues – Strategic Discussion Topics
- Good Practices (Open-Ended Results)
- Key Messages for Policy Makers

Survey Methodology

Aim
Generate evidence-based policy recommendations

Stakeholders
Government, Academia, Private sector, NGOs

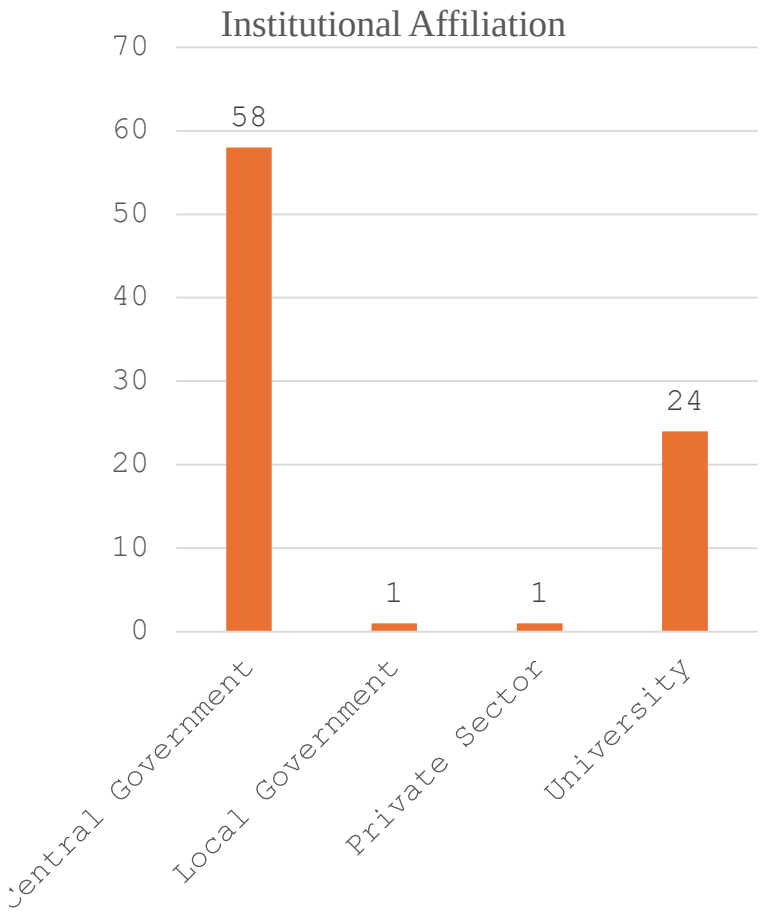
Method
Literature, Survey, Case studies

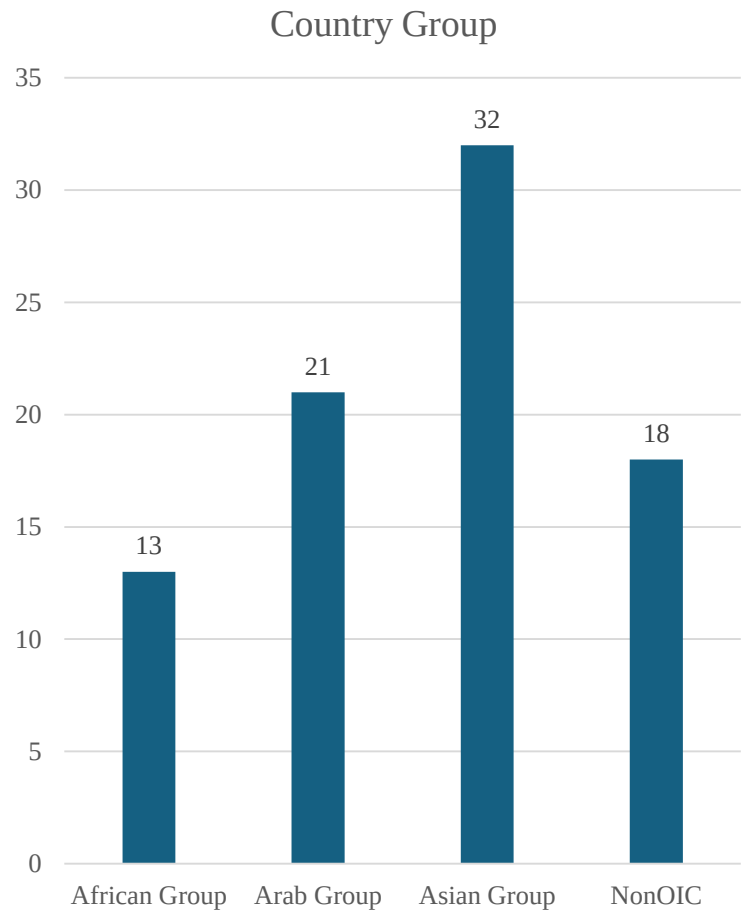
Data Collection
July 31 – Sept 2, 2025 *(SurveyMonkey)*

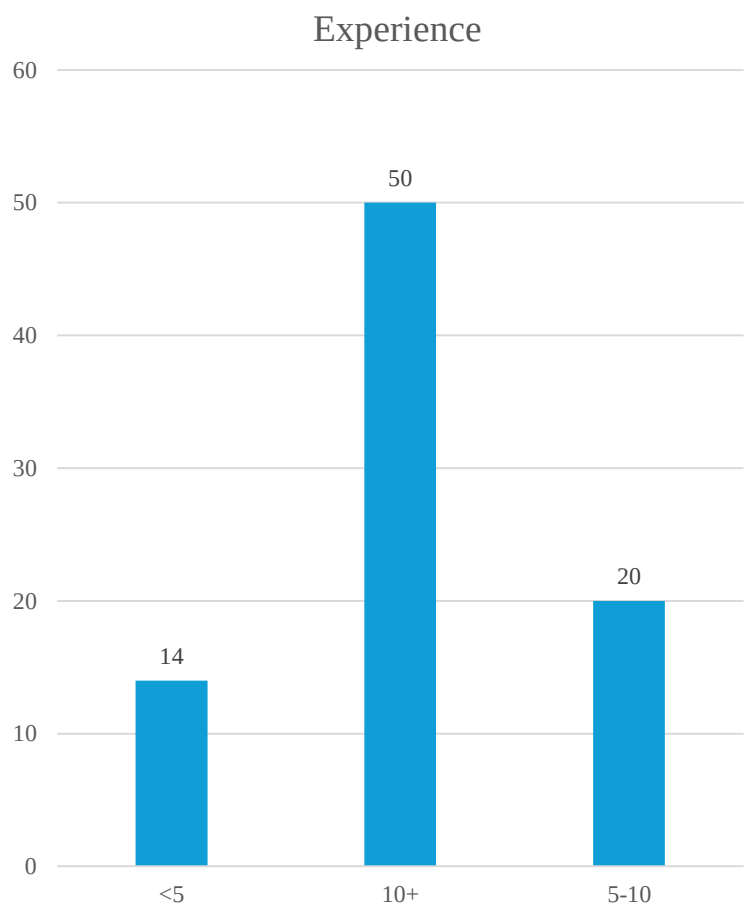
Tools
Likert scale, top-3 selections, open-ended projects

Respondents
OIC + Non-OIC, diverse stakeholder groups

Respondent Profile







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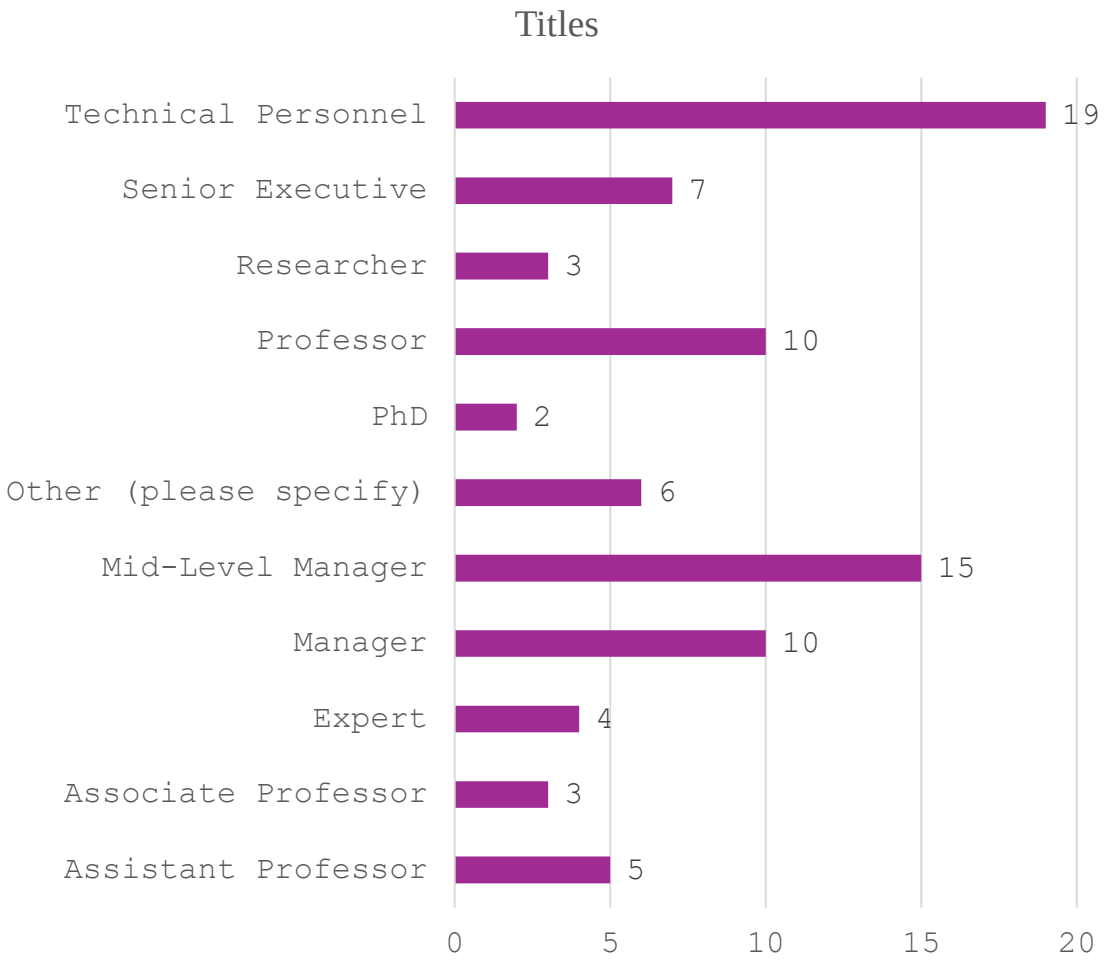
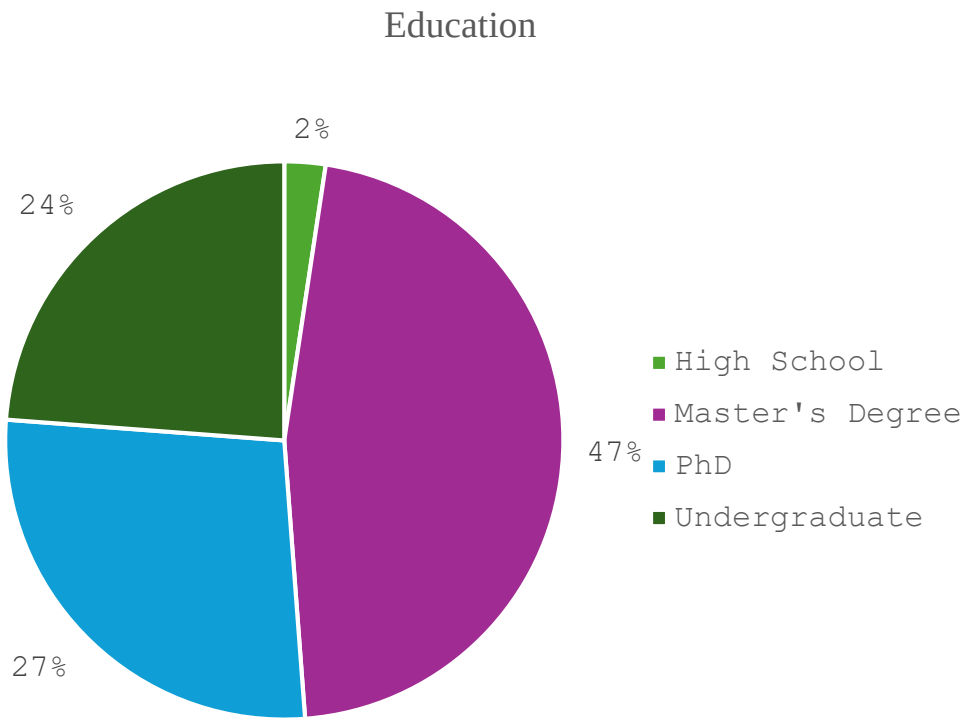
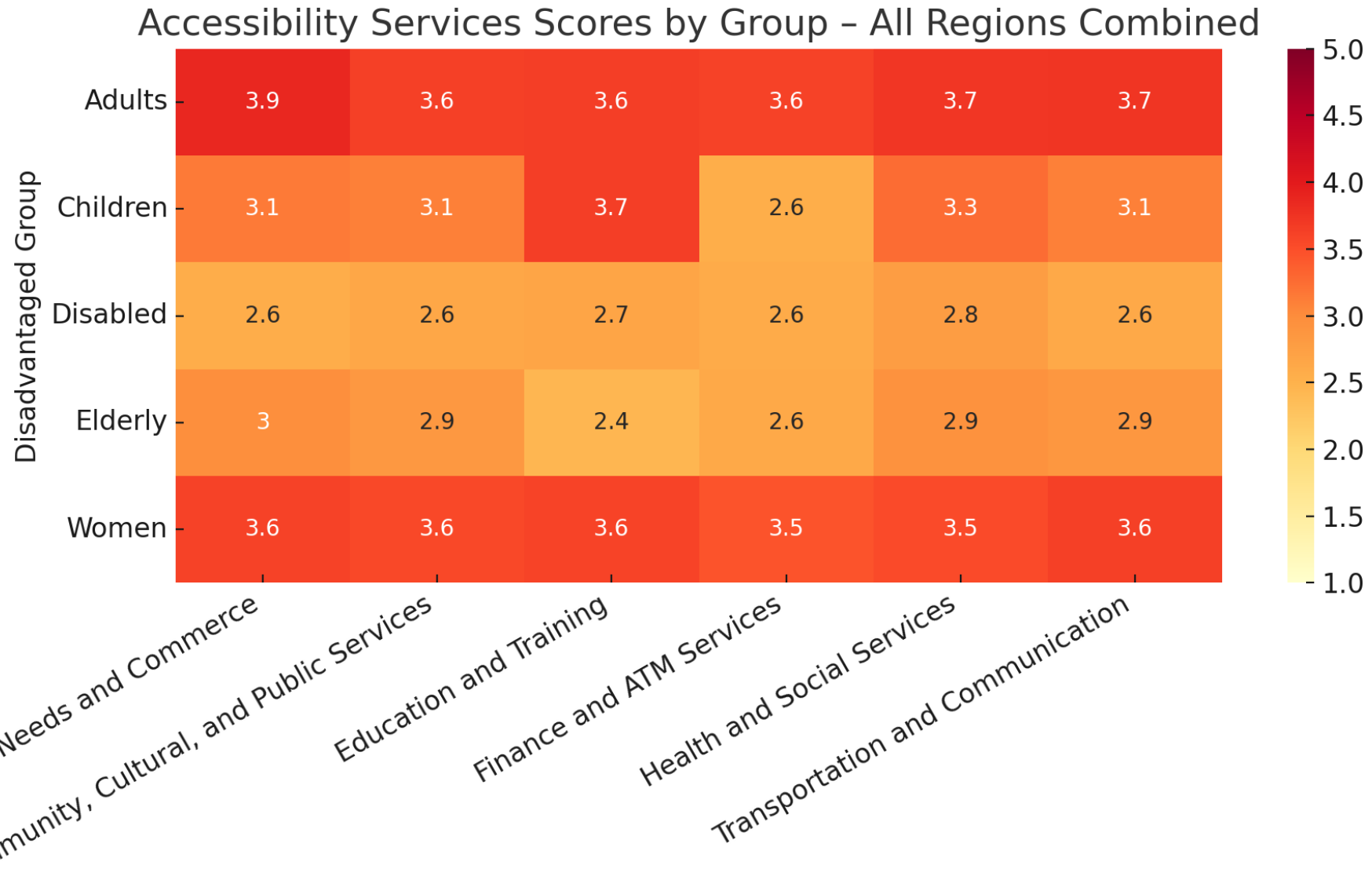




Perceived Adequacy of Services



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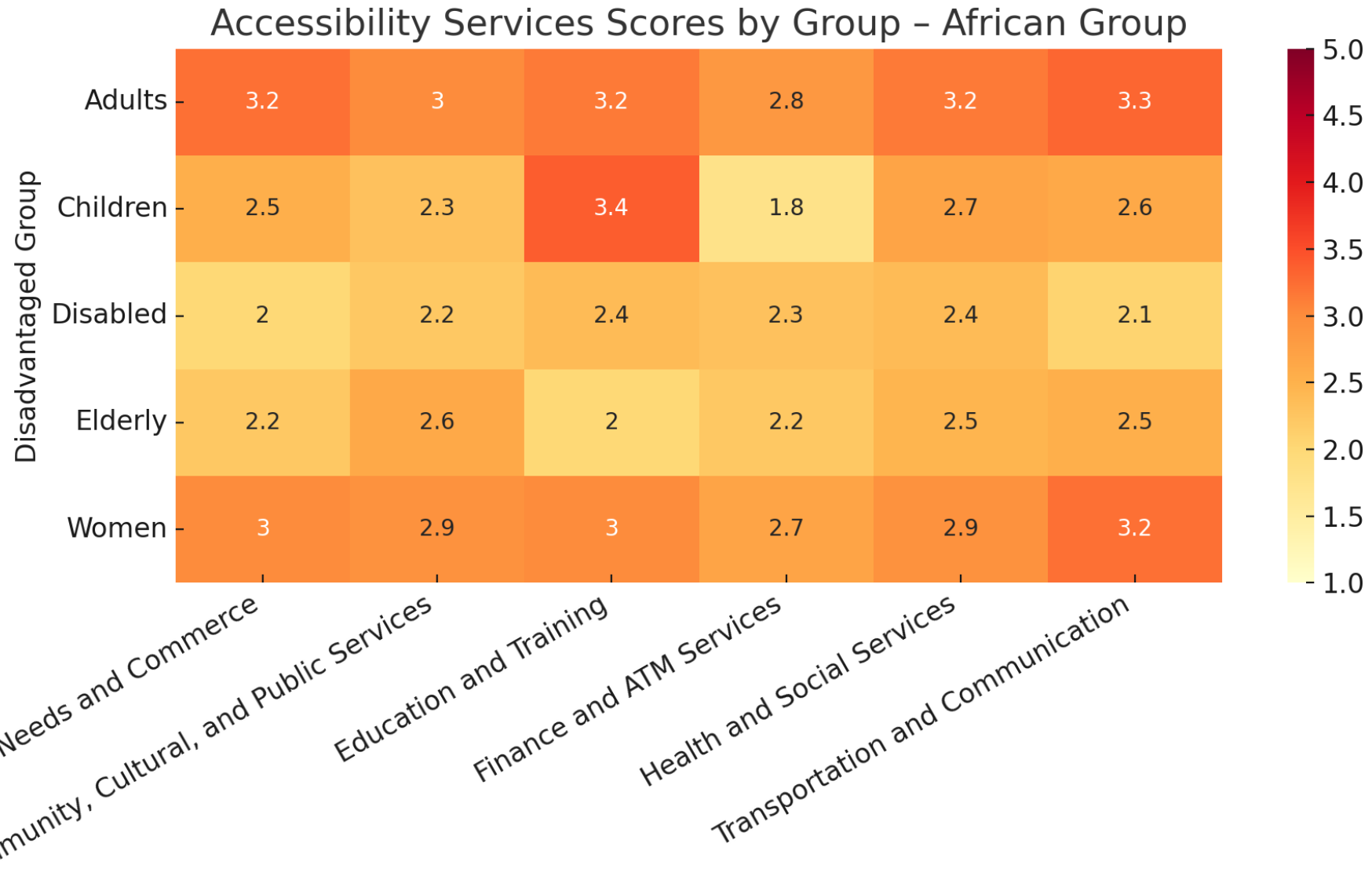

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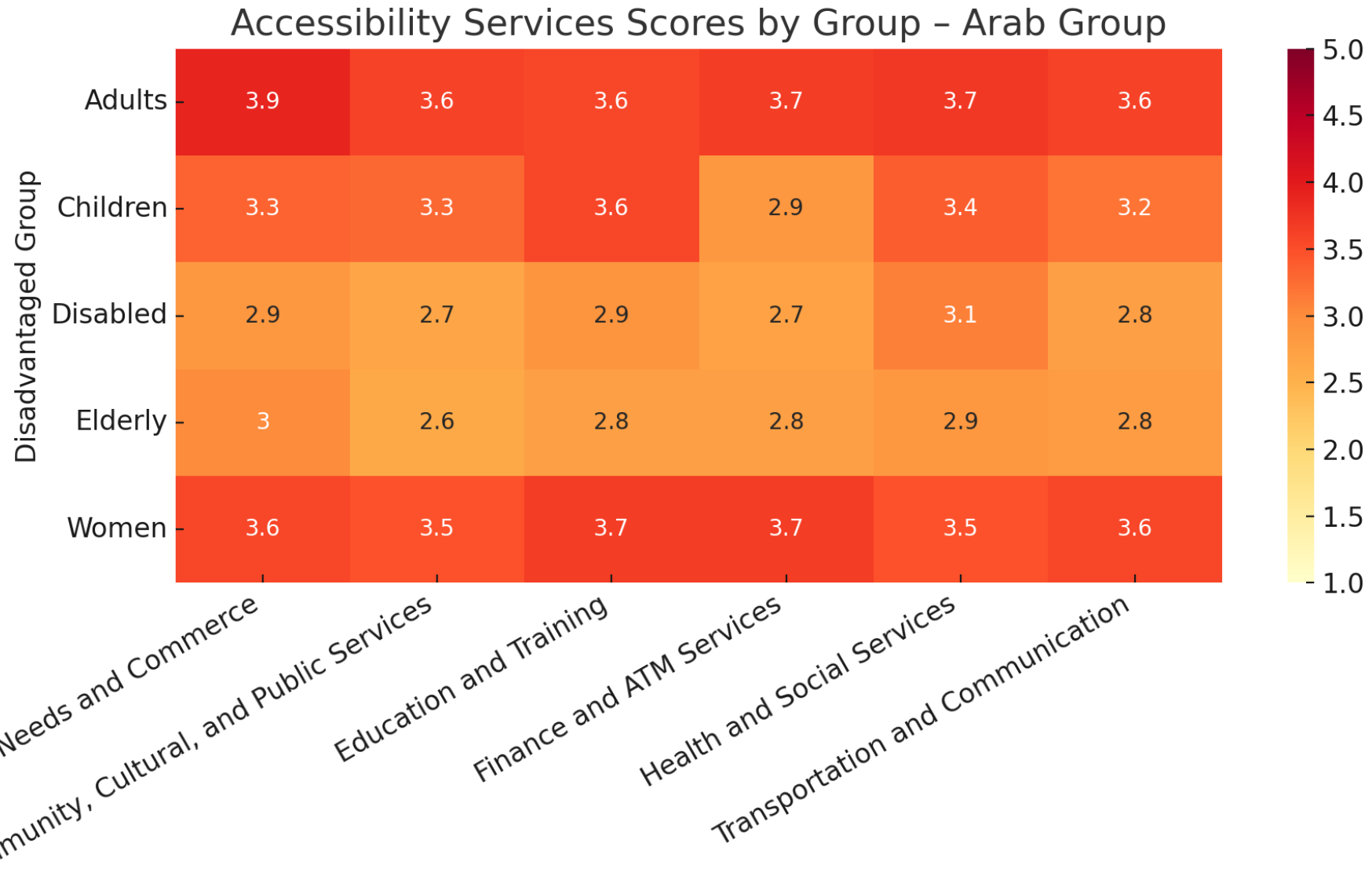

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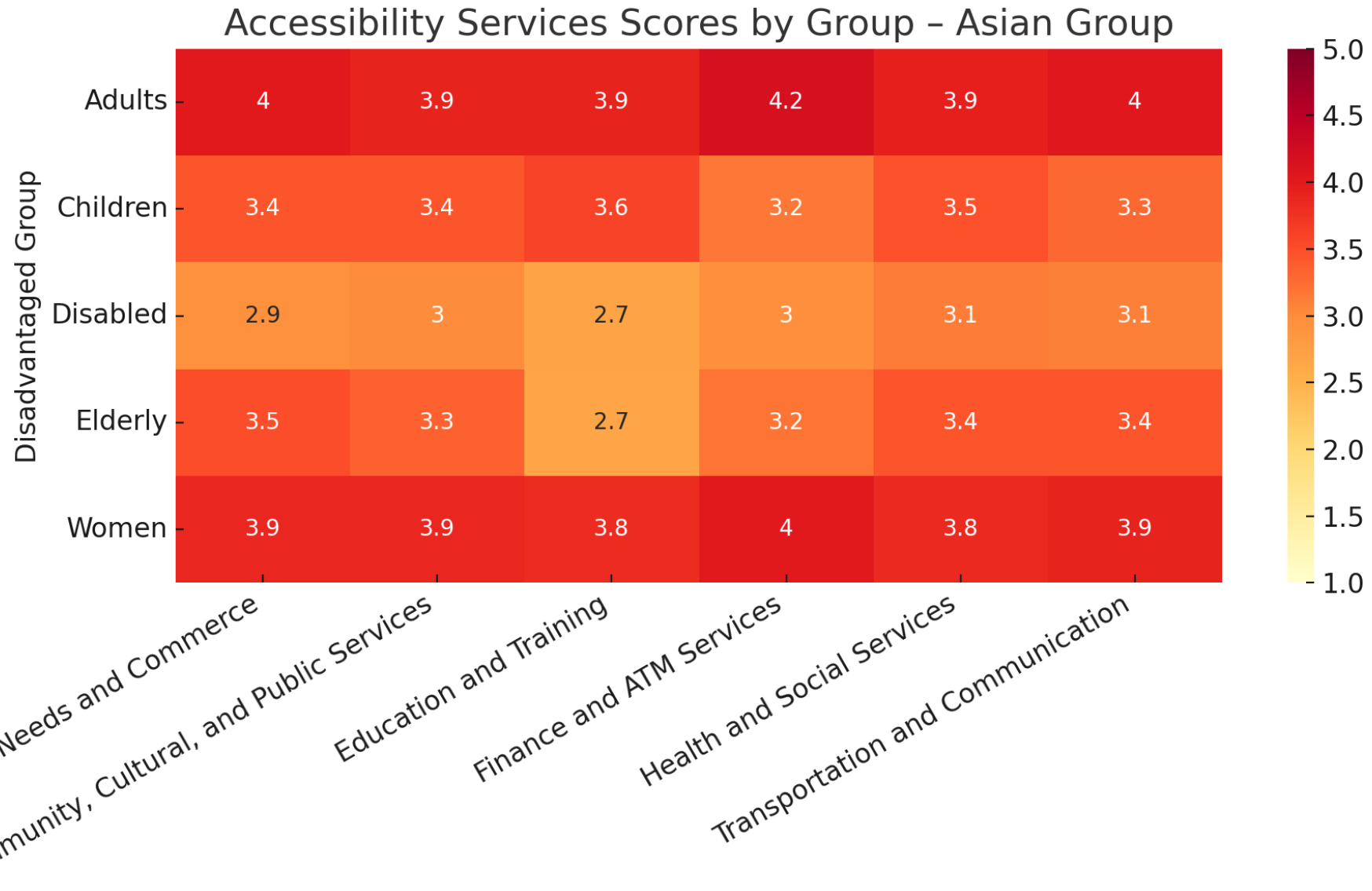

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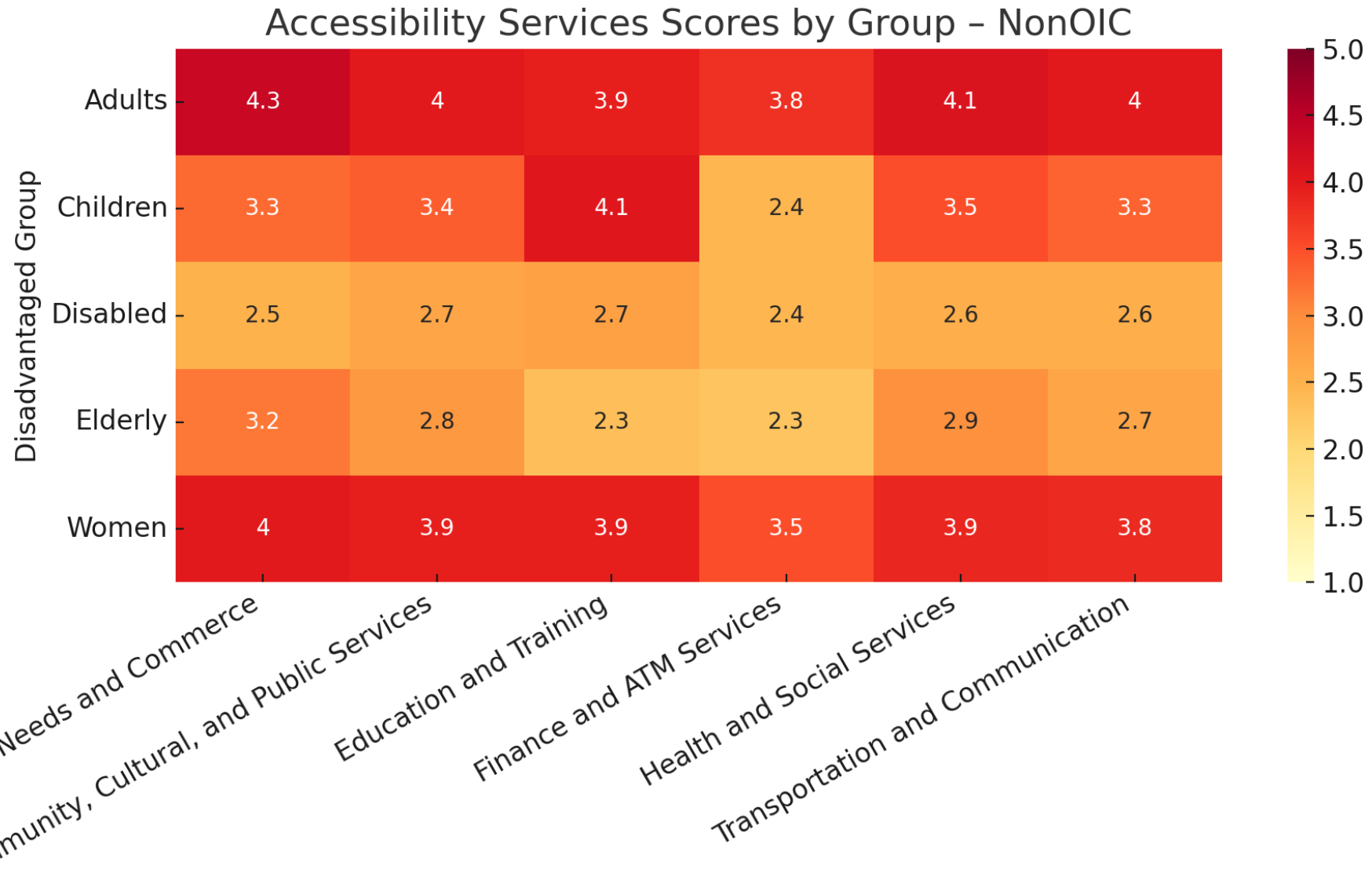

State of Rural Transport and

State of Rural Transport and

- Rural mobility is dominated by private vehicles (mean 4.15) and complemented by informal services (3.60),
- Public transport availability remains very low (2.50).
- Persistent regional disparities and last-mile barriers (3.9–3.7),
- Coupled with weak funding and institutional capacity (≈2.6–2.7), undermine reliable access to essential services

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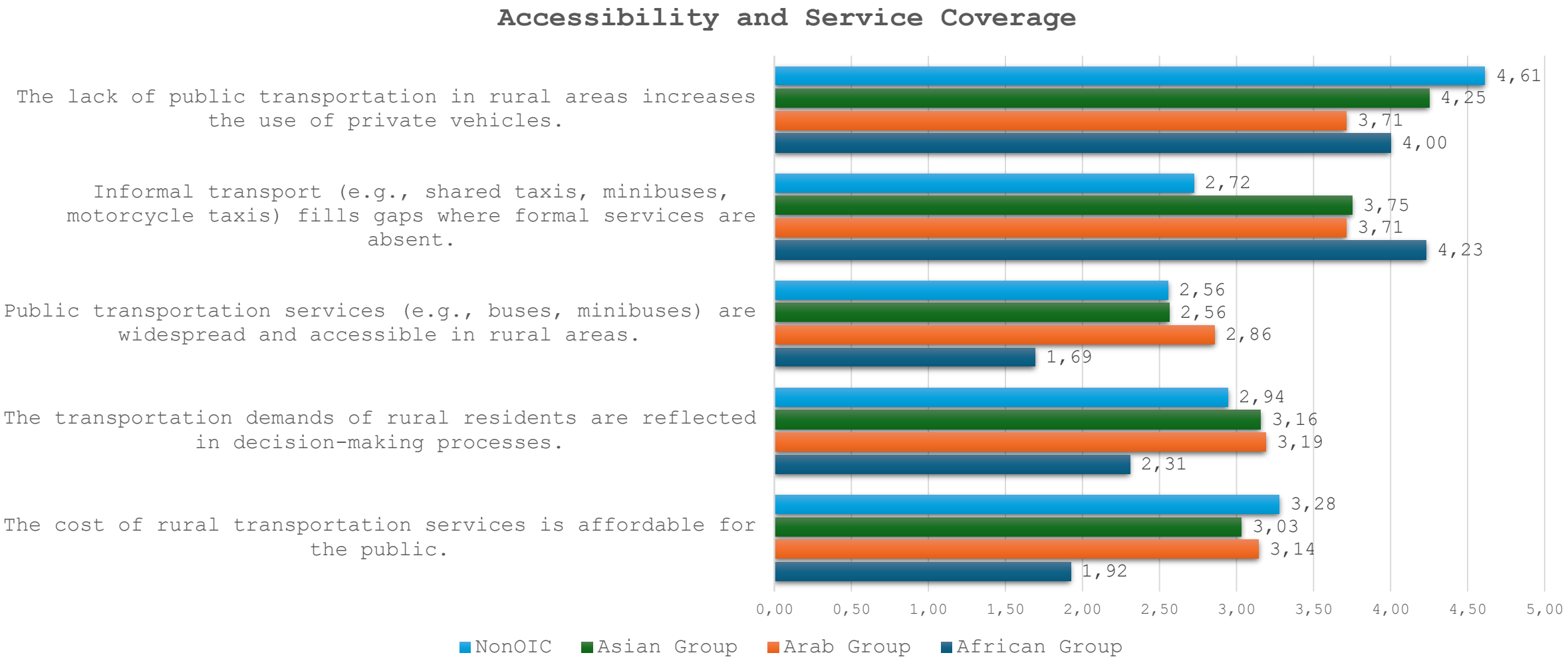

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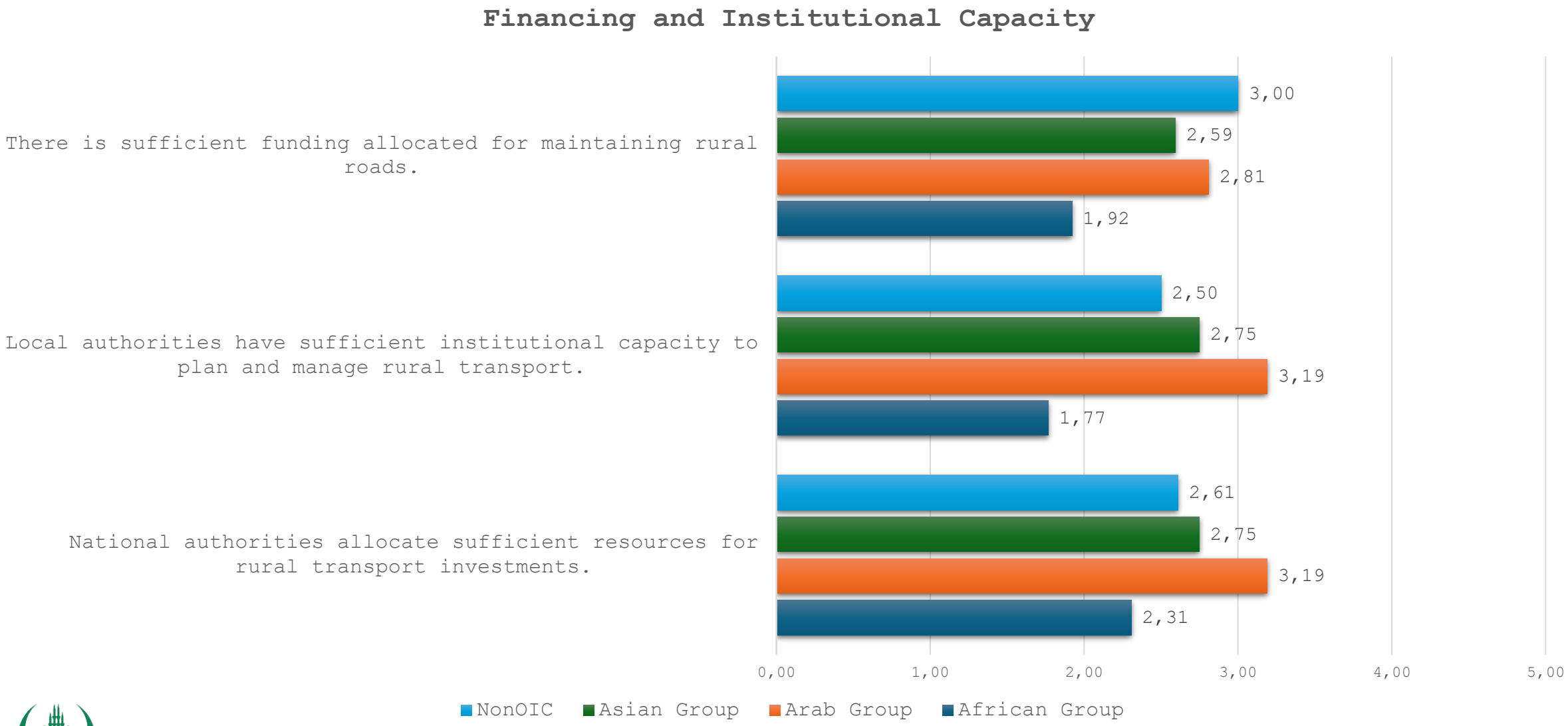

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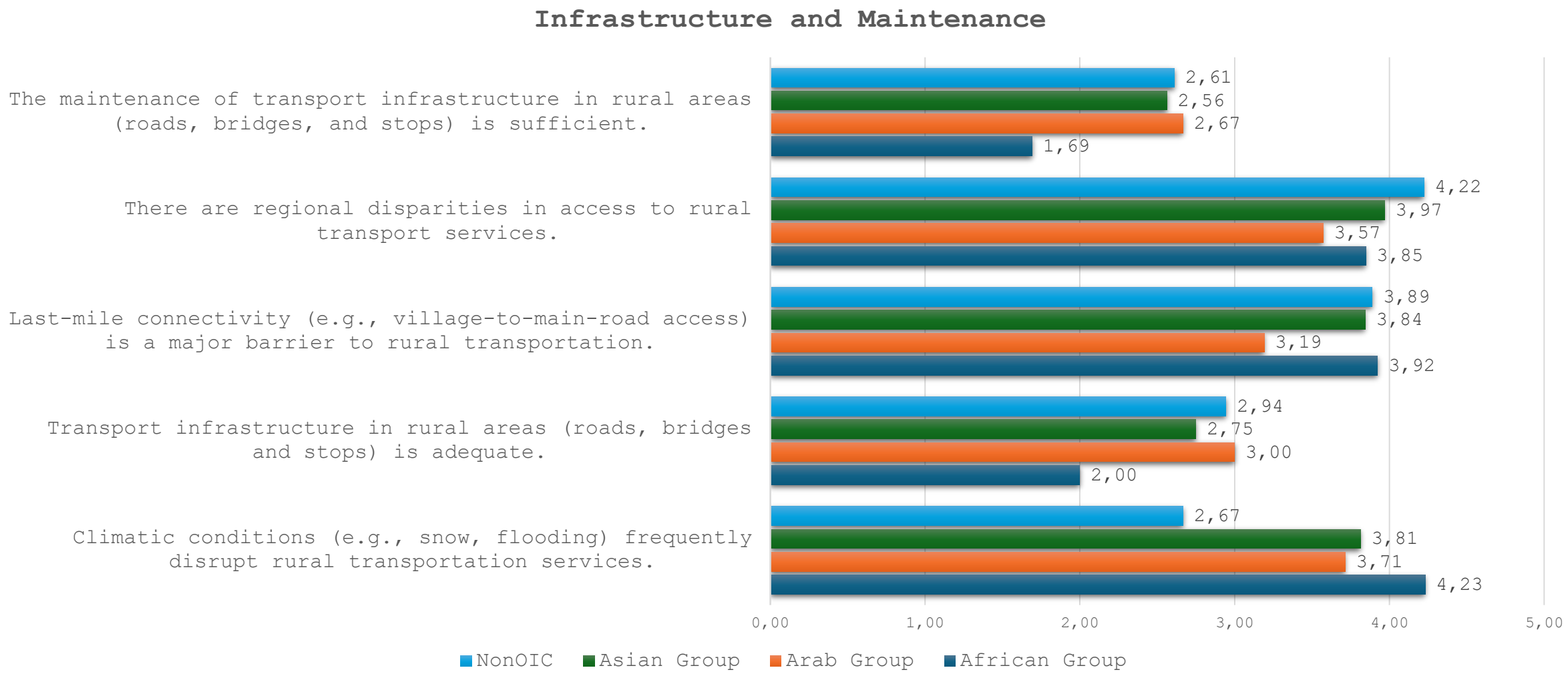

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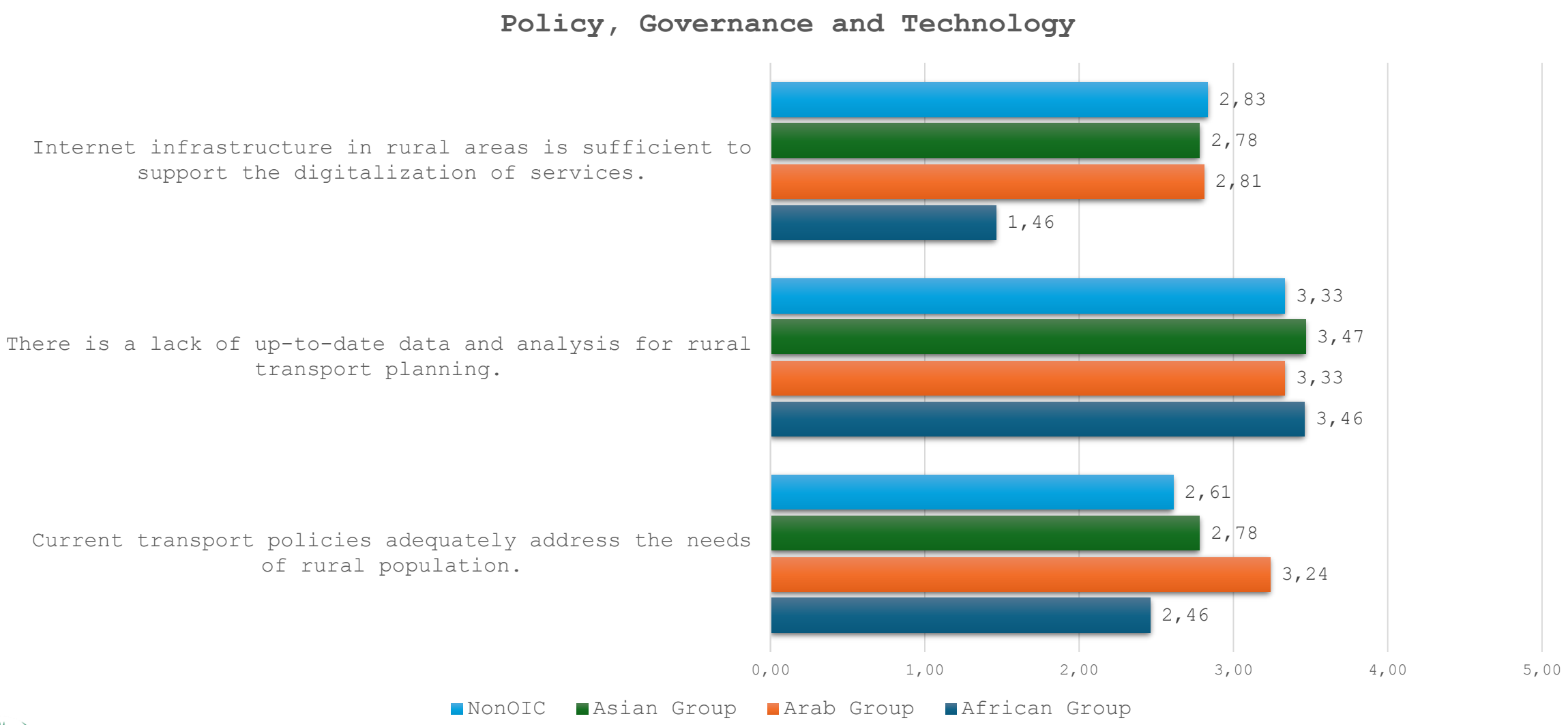
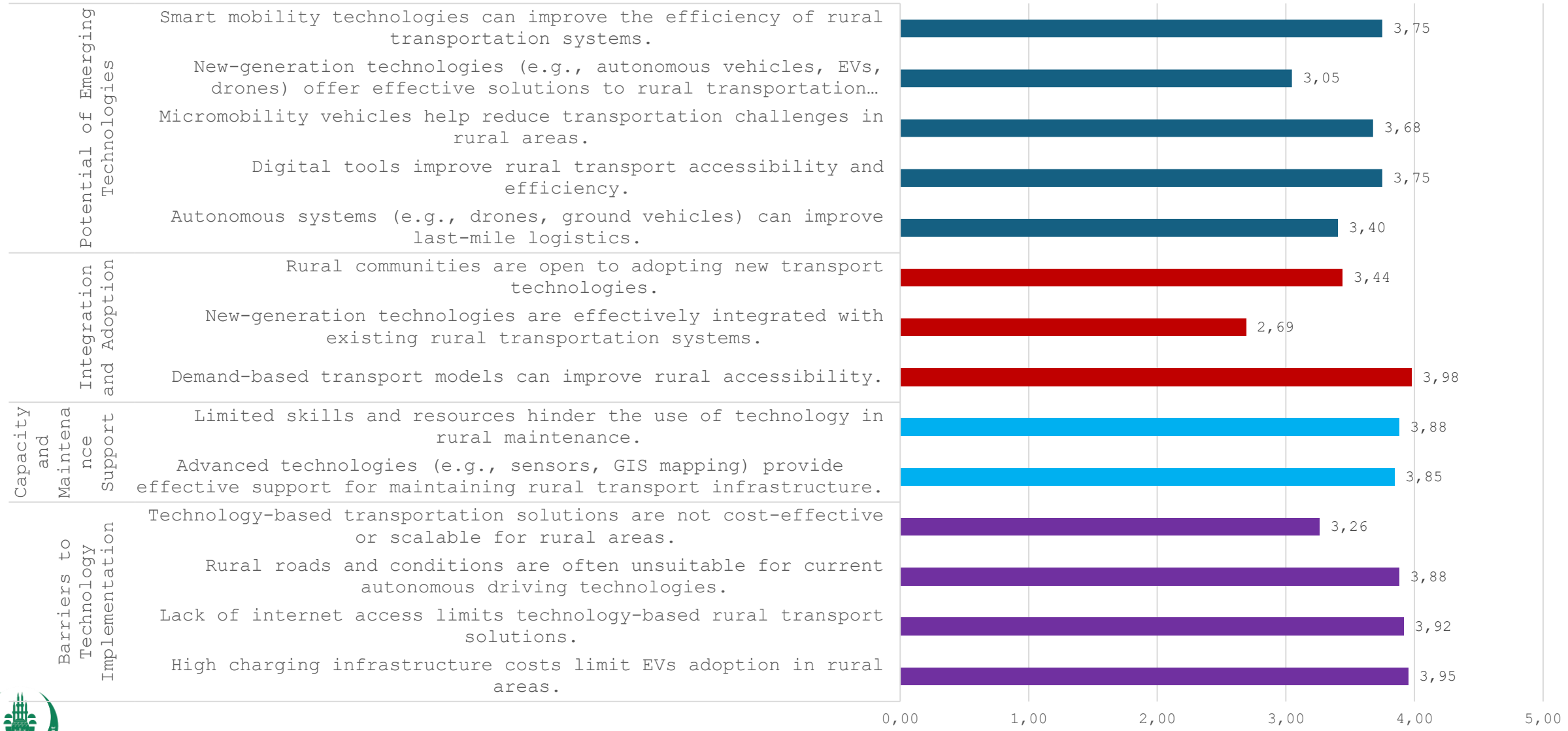


Technology Pathways, Integration,



Technology Pathways, Integration,

- Stakeholders value practical innovations such as demand-based transport (3.98) and smart/digital tools (3.75).
- However, high EV costs (3.95), poor internet access (3.92) are dampening this interest.
- Roads unsuitable for AVs (3.88), and
- Limited local skills/resources (3.88) constrain scalable technology adoption.

Sustainability, Social Needs, and

Sustainability, Social Needs,

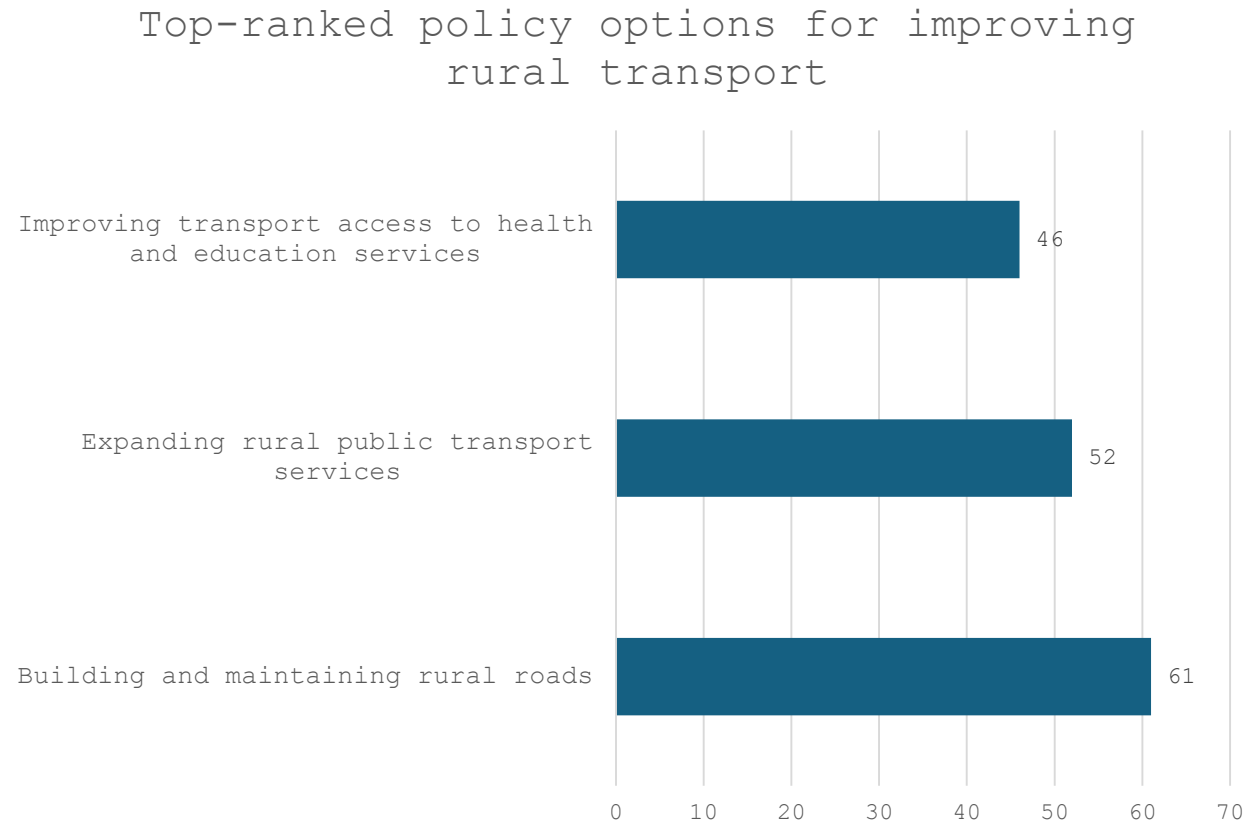
- Rural transport is viewed as critical for access to essential services (4.40) and improved quality of life (4.38),
- With strong support for prioritizing disadvantaged groups (4.21).
- While respondents back climate alignment (≈3.6–4.0),
- They caution that private vehicles remain central to access—creating environmental risks that policies must carefully balance.

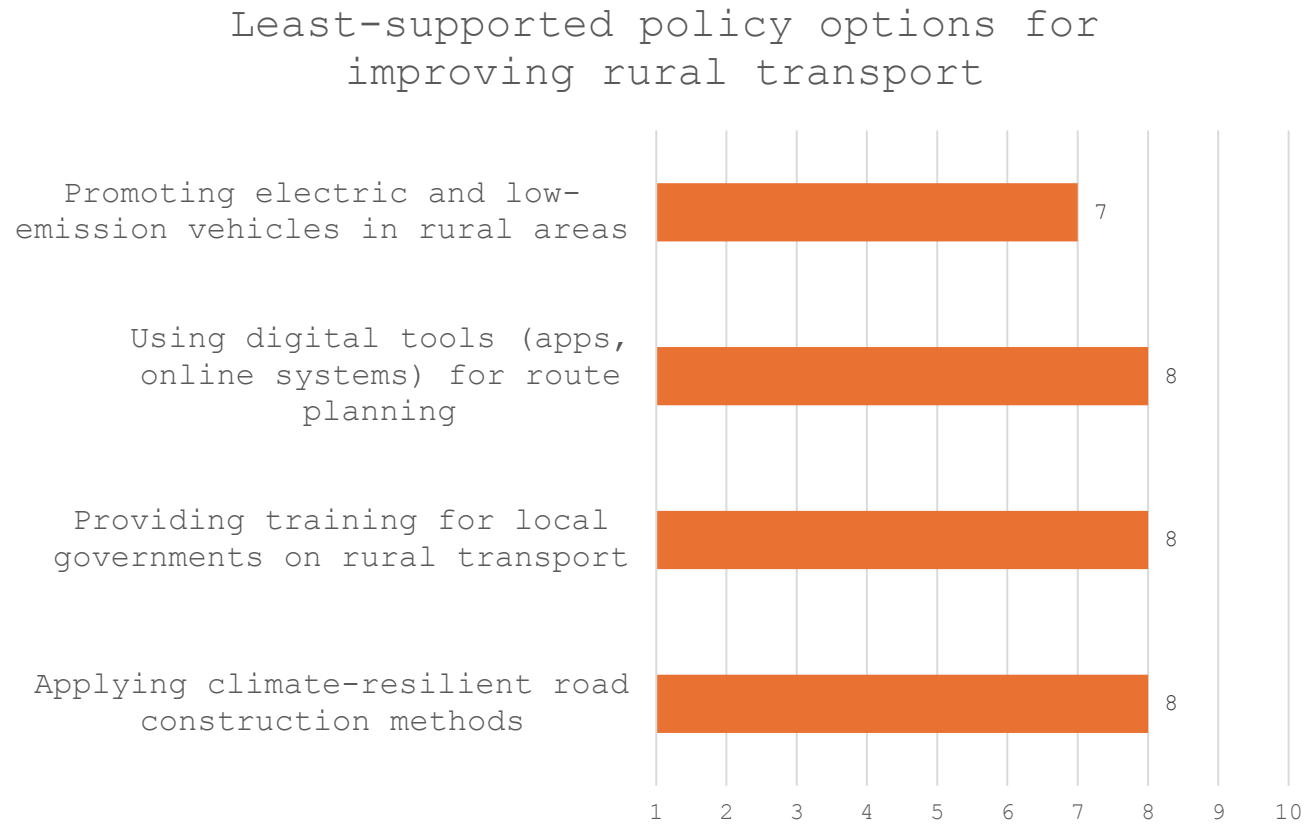
Policy Frameworks, Governance, and

Policy Frameworks, Governance, and

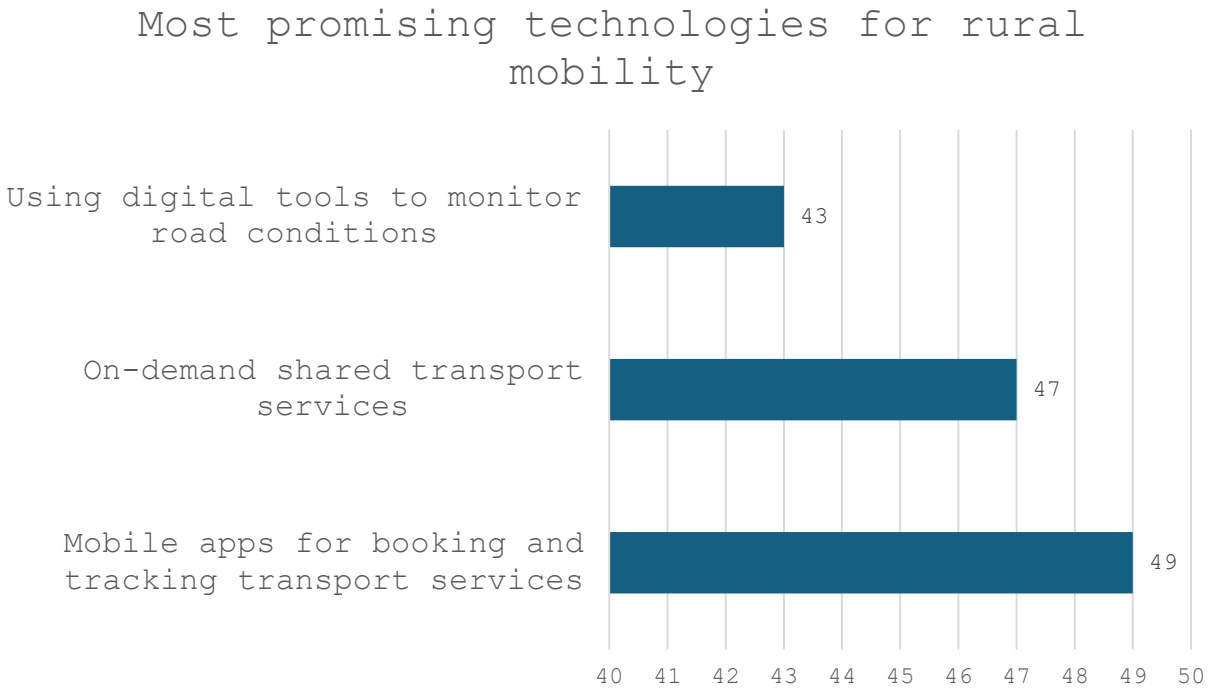
- The strongest signals indicate the integration of transportation with rural development (4.31) and the adoption of specific rural strategies (4.01).
- Joint leadership by local and central governments (≈4.1) is supported.
- Clear governance — special care funds (4.21) — is considered important.
- Defined roles and performance indicators (≈4.0–4.5) — are seen as necessary for effective service delivery.

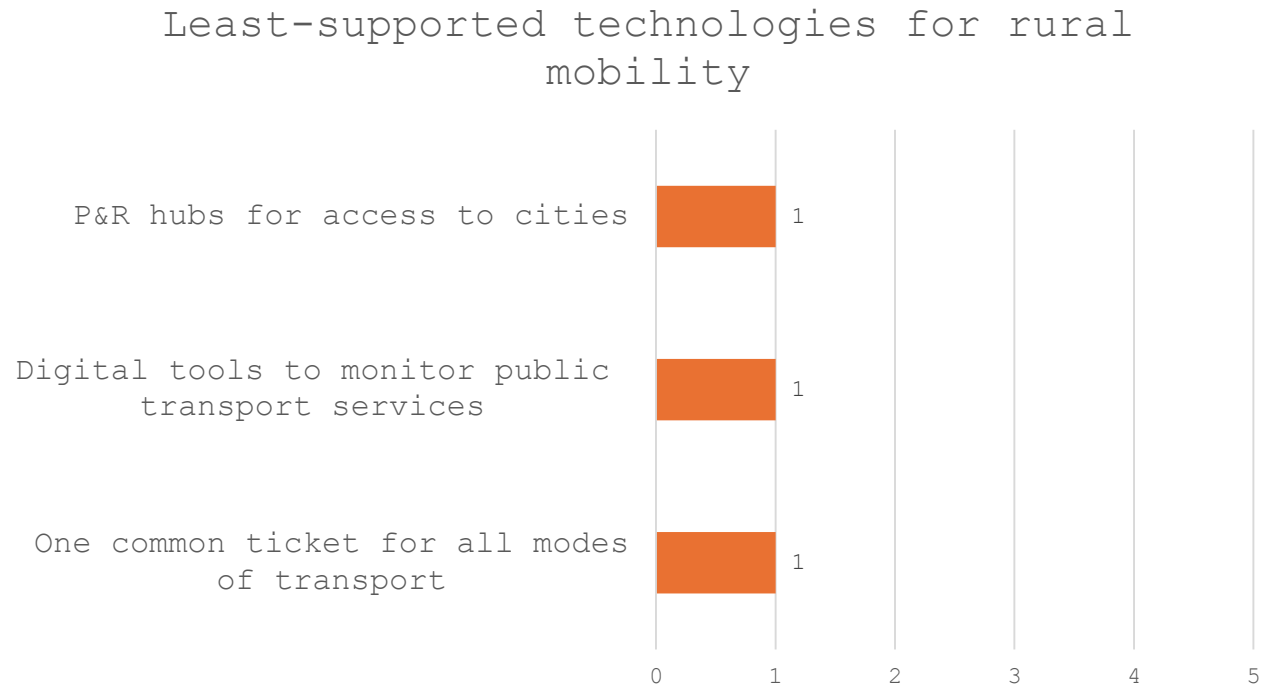
Policy options for improving





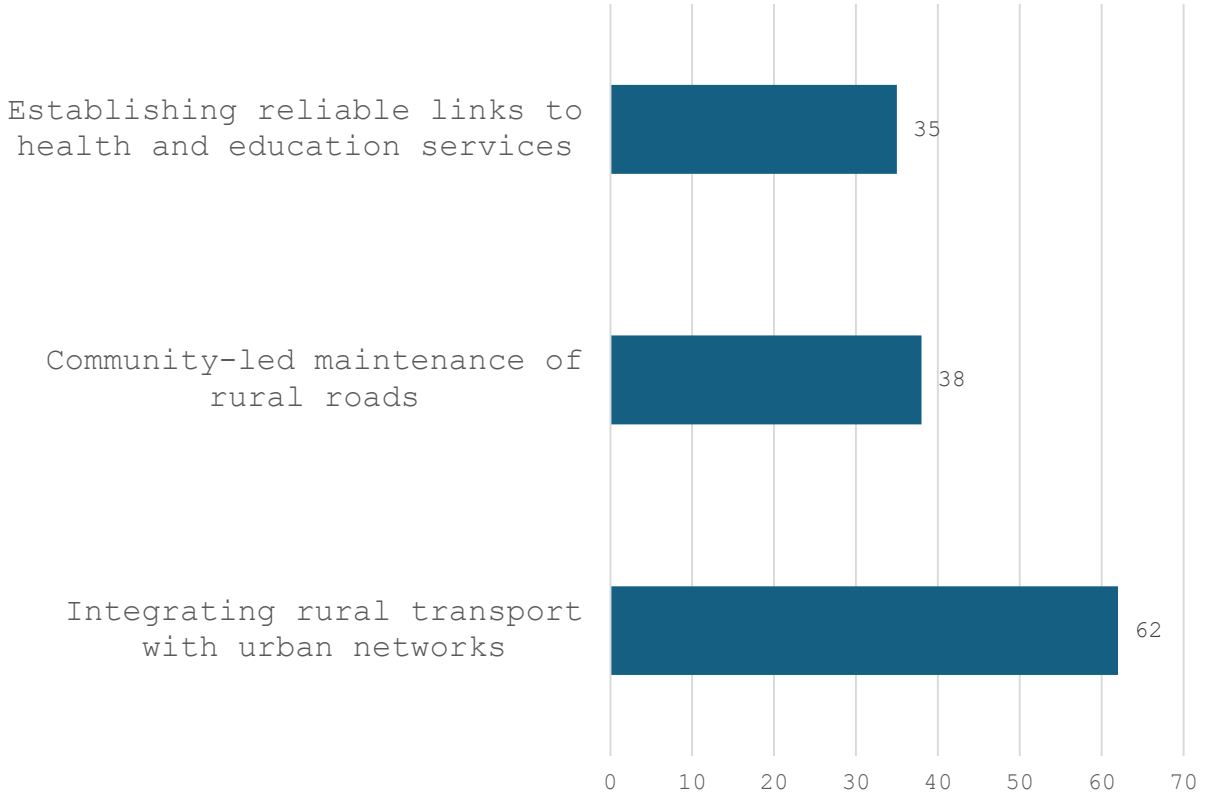
Technology pathways for rural mobility and challenges



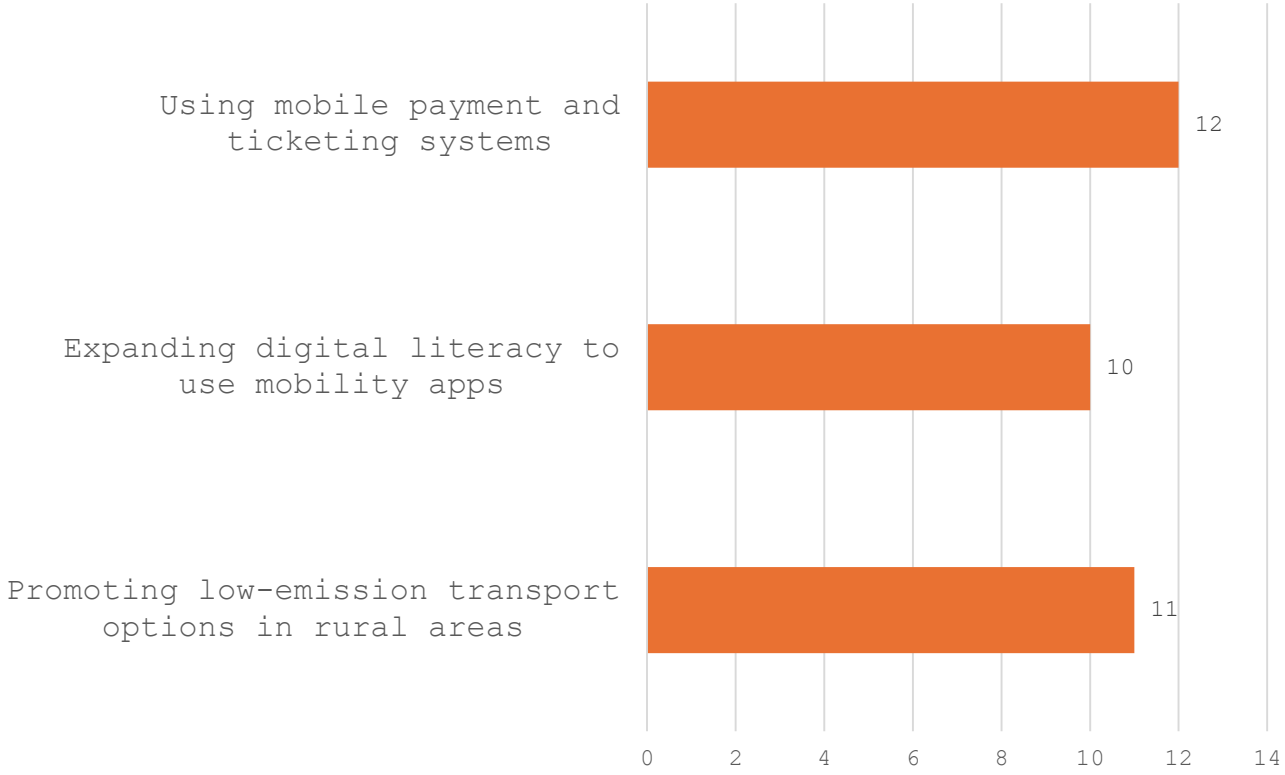


Practical measures for enhancing

Most effective practices and actions

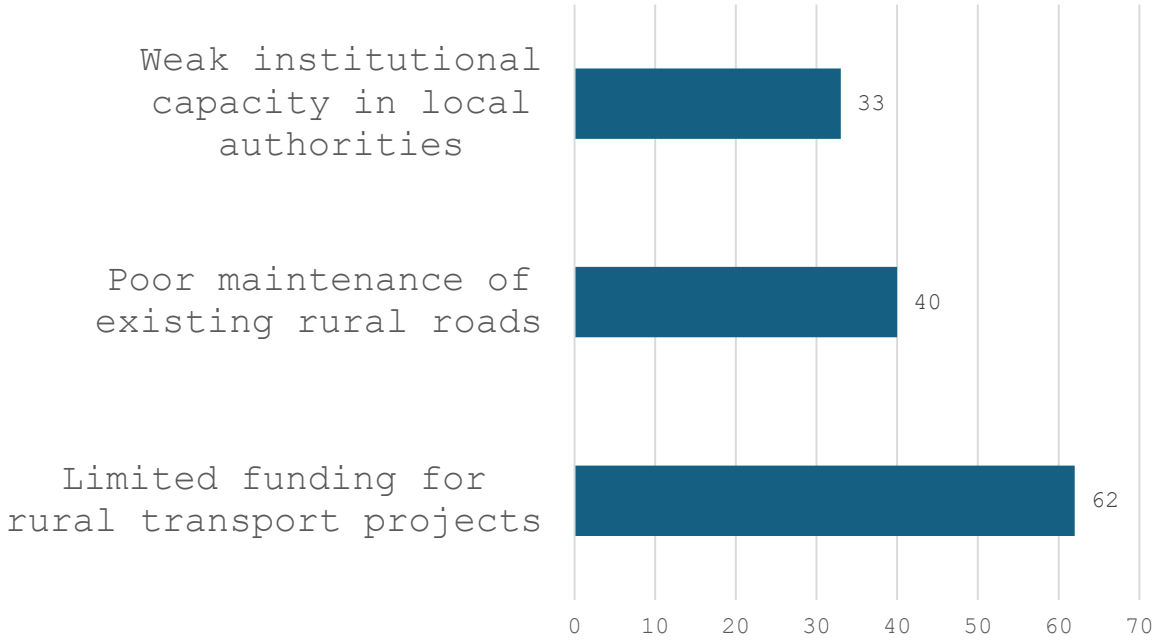


Practices and actions considered least effective

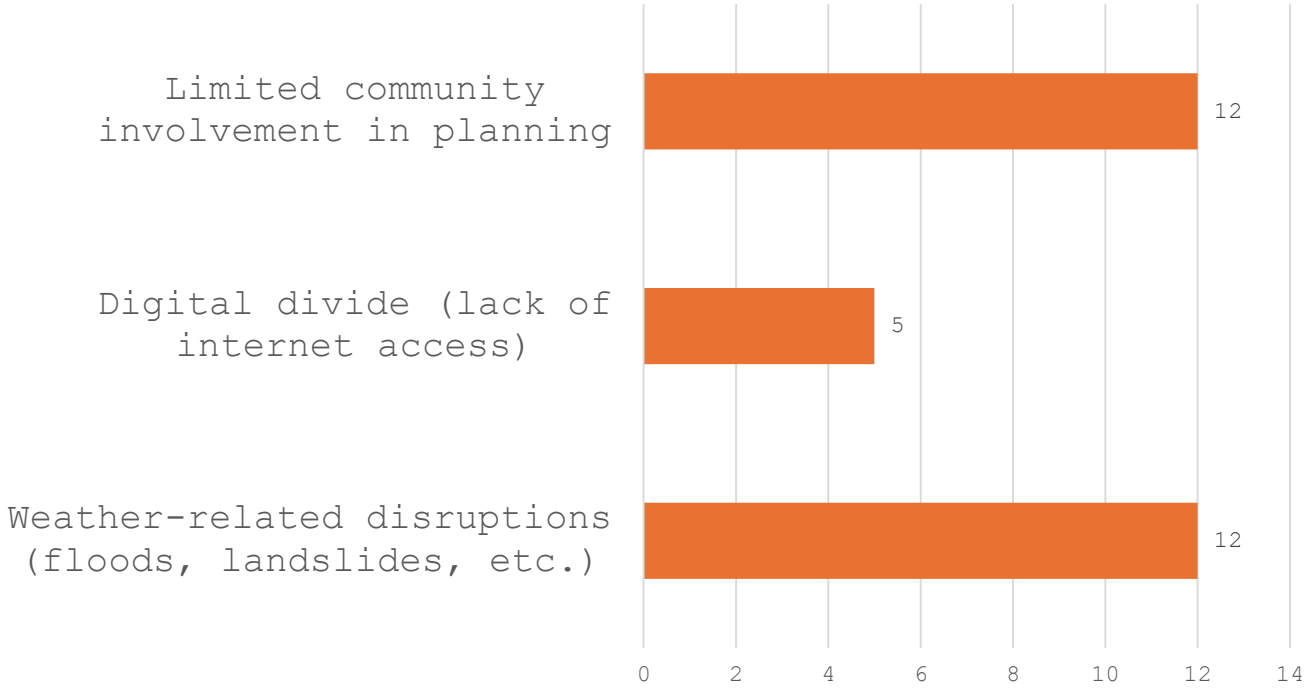


Barriers and challenges to policy

Top challenges identified for implementing rural transport policies



Challenges viewed as less significant for rural transport policies



Good Practices (Open-Ended Results)

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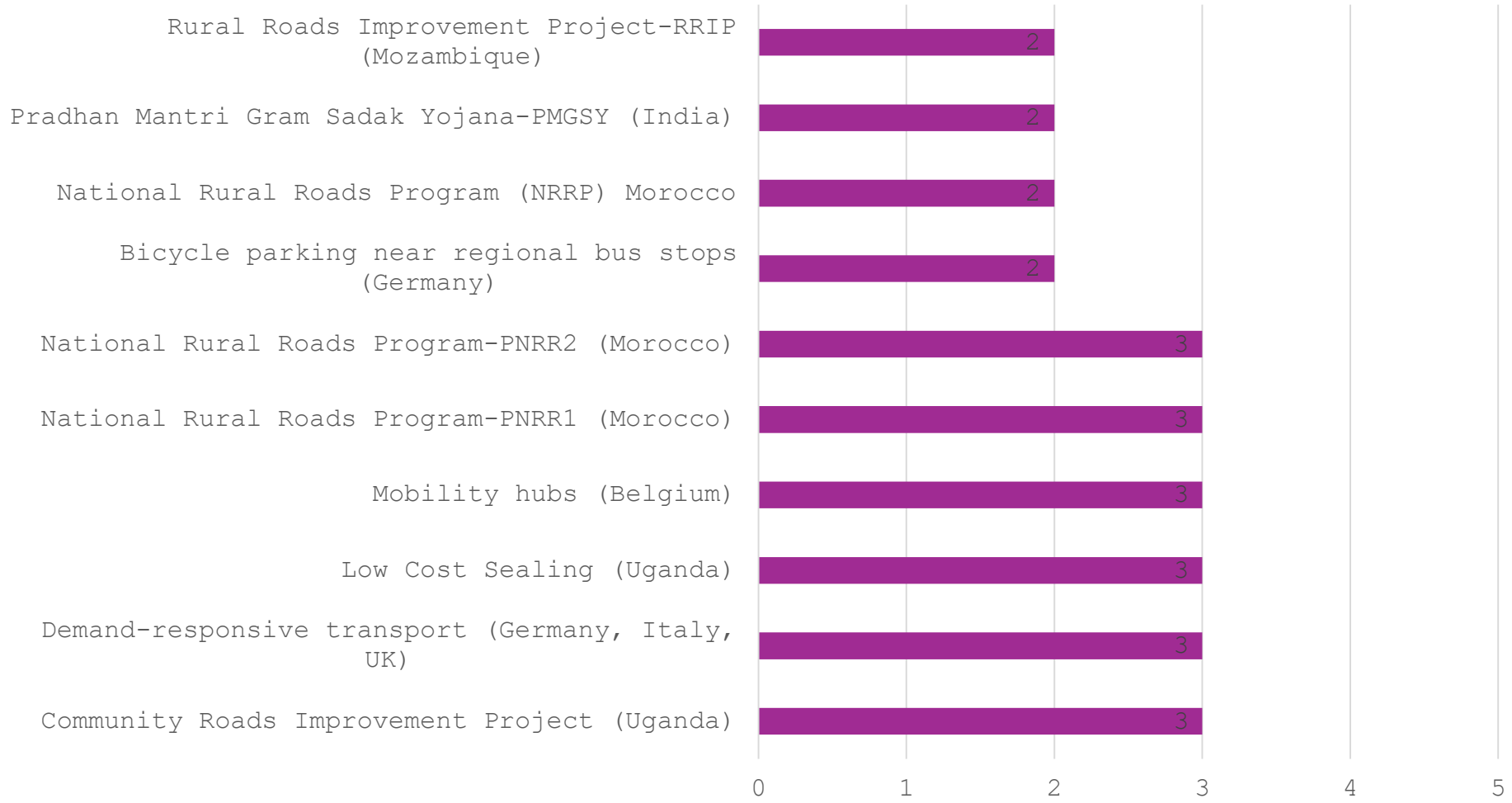
Good Practices (Open-Ended

- **Over 100+ examples** collected from multiple countries
- **Frequent themes:** demand-responsive transport, maintenance funds, digital tools
- **Strong cases:** India’s PMGSY, Morocco’s PNRR, Indonesia’s rural programs

Good Practices (Open-Ended

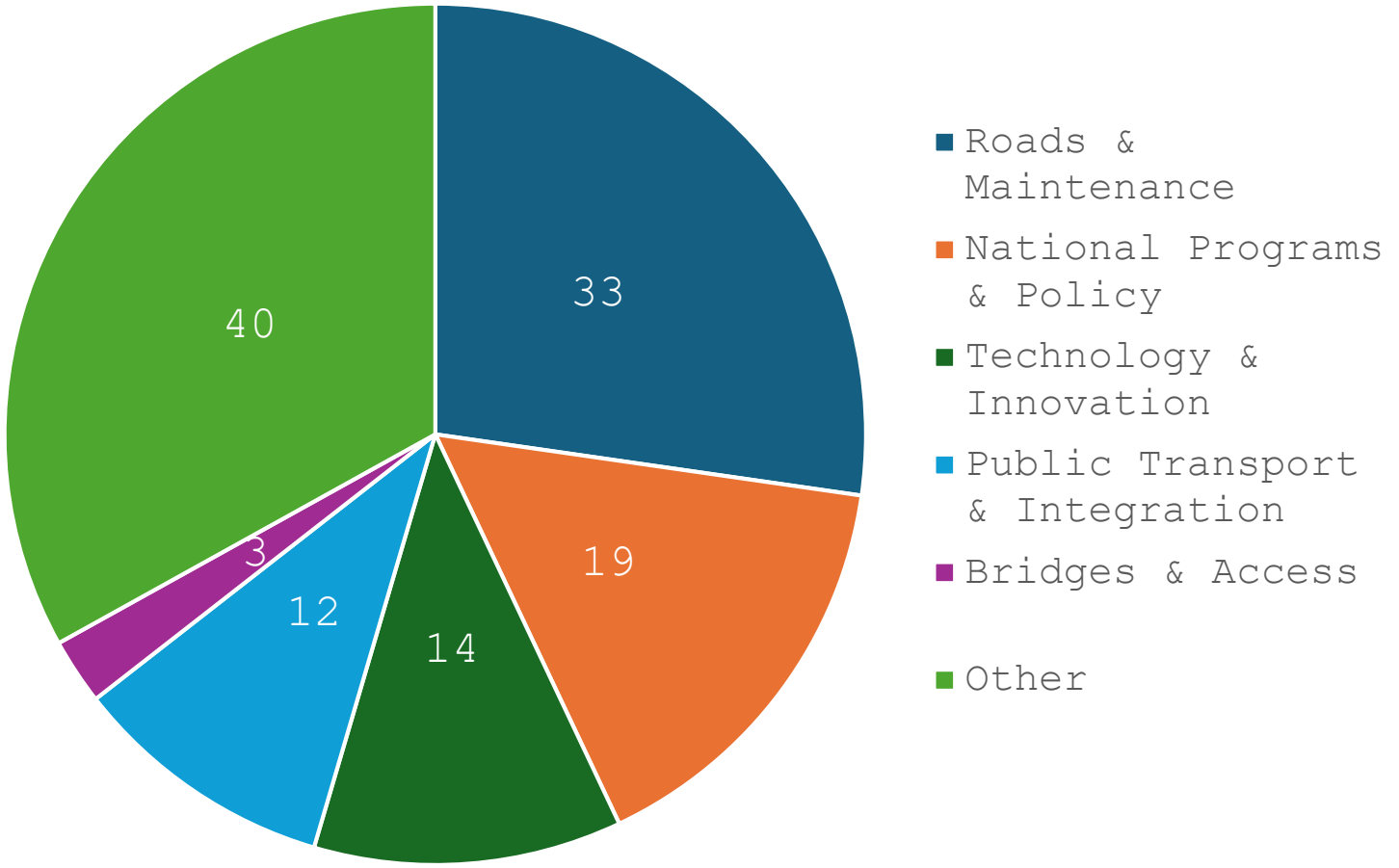
The most popular good projects



Good Practices (Open-Ended

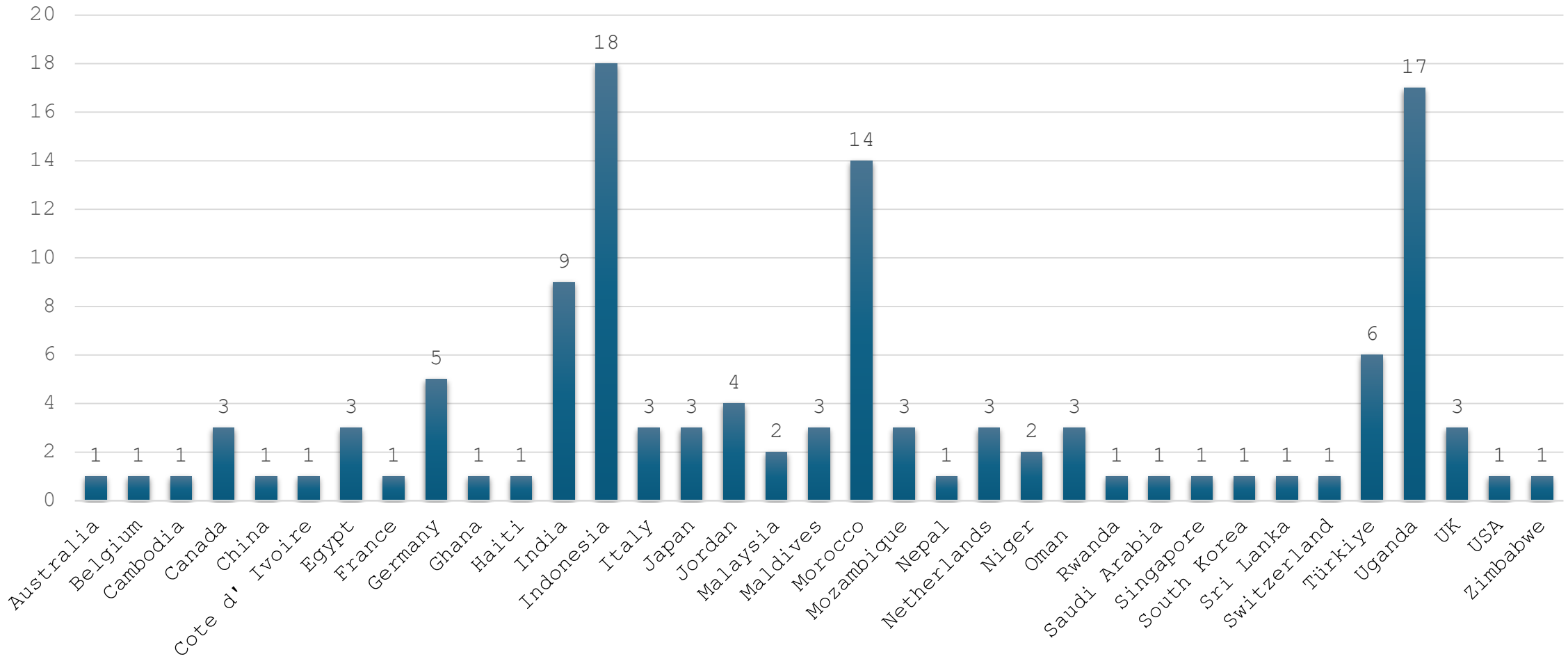
Classification of best-practice projects by theme

Total Number of Project: 121



Good Practices (Open-Ended

Number of best-practice projects reported by country



Key Issues – Strategic Discussion Topics

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Key Issues – Strategic

Introduction

- Survey findings highlight **critical tensions** in rural transport: accessibility vs. sustainability, innovation vs. feasibility.
- Topics selected based on **survey evidence, literature, and global policy relevance.**
- **Focus:** how emerging solutions (EVs, AVs, ITS, etc.) apply to rural realities and what lessons they offer for OIC countries.
- **Policy goal:** translate these insights

Key Issues – Strategic

Summary

- **EVs and Charging Equity:** Affordability & infrastructure gaps
- **Autonomous Vehicles:** Potential but limited by roads & digital divide
- **ITS in Low-Density Regions:** Opportunities but requires infrastructure
- **Vehicle Ownership vs Sustainability:** Accessibility vs emissions

Key Issues – Strategic EVs and Charging Equity in Rural Areas

Bridging the Urban–Rural Divide in EV Adoption

- Rural EV uptake lags urban areas due to charging infrastructure gaps and affordability.
- **Survey:** only 37% agreed EVs should be prioritized; many favor road maintenance and fossil fuels in short term.
- Global examples (e.g., Germany) show rural areas can lead when strong policies and incentives exist.
- **Policy implication:** Inclusive strategies needed—fund rural charging corridors, incentivize rural EV use, explore sola based chargers.

Key Issues – Strategic

Applicability of autonomous vehicles in rural settings

AVs: Niche Opportunities, Not Broad Deployment (Yet)

- Rural roads and poor connectivity limit AV readiness; **76% of survey respondents agreed** roads unsuitable.
- But **53% supported drones/AVs for last-mile logistics** → clear support for targeted use cases.
- Pilots in U.S. rural areas/national parks show acceptance grows after exposure.
- Policy implication: Start with **niche pilots** (drones, shuttles, healthcare deliveries); focus on road quality + connectivity first.

Key Issues – Strategic

Effectiveness of ITS in Low-Density Rural Regions

Smart Solutions Must Match Rural Realities

- ITS for cities (traffic management, adaptive signals) less relevant; rural ITS should focus on **safety, maintenance, and demand-responsive transport.**
- Survey: **80% cited lack of internet, 80% cited limited skills** as barriers.
- Yet **70% believed smart mobility can improve efficiency** → optimism if gaps are closed.
- Policy implication: Expand rural broadband, invest in low-cost ITS (SMS alerts, GPS tracking) tailored to rural needs.

Key Issues – Strategic

Vehicle Ownership vs. Sustainable Rural Transport

Balancing Car Dependency with Sustainability Goals

- Private vehicles are a **necessity** in rural areas; over **80% of respondents agreed** lack of PT forces car use.
- **60% said accessibility should take priority when it conflicts with sustainability.**
- Car reliance worsens emissions and affordability gaps; vulnerable groups excluded if no car.
- Policy implication: Make cars cleaner (EVs, hybrids), expand affordable alternatives (demand-responsive, community-led, micromobility).

Key Issues – Strategic

Climate Action and Emissions Policy Differentiation

Climate Policies Must Be Ambitious and Fair

- Uniform policies risk rural backlash (e.g., Yellow Vests); rural drivers more resistant.
- Survey: **62% supported flexibility in emissions policies, 60% prioritized accessibility when in conflict.**
- Global practices: EU Social Climate Fund, U.S. NEVI grants → cushioning rural households while funding EV and PT.
- Policy implication: Adopt **differentiated but coordinated**

Key Messages for Policy Makers

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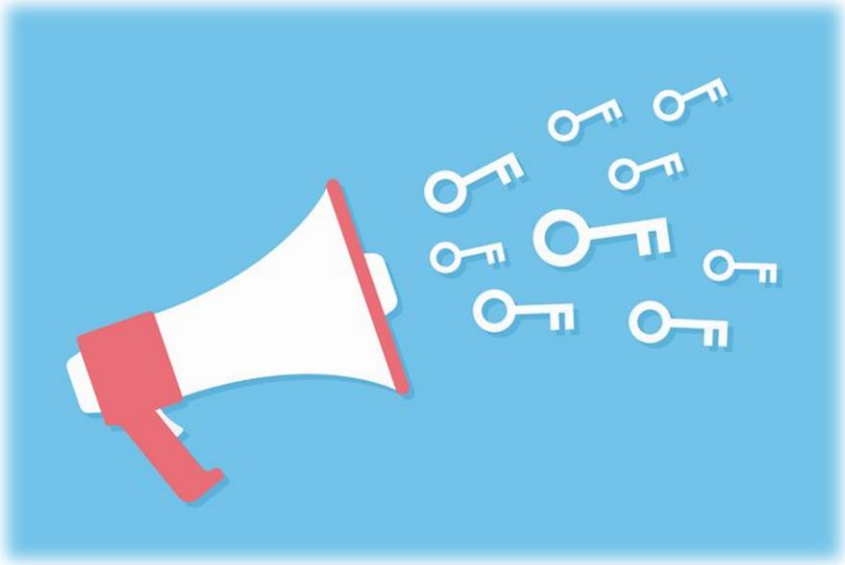
Key Messages for Policy Makers

Introduction



Building credible, inclusive, and practical guidance

- Findings reflect inputs from experienced and diverse stakeholders (OIC + non-OIC).
- Broad participation ensures comparability and policy relevance.
- Recommendations are grounded in lived

Key Messages for Policy Makers

Summary

- Rural accessibility is a social right
- Maintenance and funding are the backbone of sustainability
- Policies must be differentiated for rural contexts
- Climate goals must be balanced with rural mobility needs
- Technology adoption must be practical, affordable, and context-specific

Key Messages for Policy Makers

Accessibility Challenges

Bridging persistent rural access gaps

- Affordability and last-mile connectivity are the most critical barriers.
- Disadvantaged groups (elderly, women, disabled) remain underserved.
- Infrastructure maintenance is a recurring weakness undermining reliability.

Key Messages for Policy Makers

Technology and Innovation

Prioritize practical, scalable solutions

- Mobile apps, on-demand transport, and monitoring tools deliver immediate benefits.
- High costs, limited internet, and unsuitable roads hinder advanced systems.
- Integration into existing rural transport requires targeted support.

Key Messages for Policy Makers

Sustainability and Social Dimensions

Balancing climate goals with rural needs

- Transport is central to quality of life and access to essential services.
- Maintenance must be treated as a top policy priority.
- Flexibility is essential when sustainability and accessibility objectives conflict.

Key Messages for Policy Makers

Policy and Governance

Clear strategies, roles, and funding mechanisms

- Guarantee access to essential services and integrate with rural development.
- Empower local governments while sustaining central subsidies.
- Dedicated funds and clear institutional coordination are critical.

Key Messages for Policy Makers

Stakeholder Priorities

Consensus on fundamentals across the survey

- **Policies:** Invest in roads, expand public transport, improve access to services.
- **Technologies:** Mobile apps, demand-based transport, road monitoring.
- **Practices:** Rural–urban integration, community-led maintenance, reliable links.

Key Messages for Policy Makers

Best Practices

Infrastructure first, innovation where feasible

- Roads and maintenance projects dominate global examples.
- National programs and digital tools show strong results in selected contexts.
- Best practices are context-specific but converge on sustainability, governance, inclusiveness.

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