

Performance-Based Contracts for Management and Maintenance of Roads (PMMR)

Module 7

**Other resources for getting
information on PMMR**

List of documents relevant for PMMR

- **Toolkit for Public Private Partnerships in Highways, World Bank**
<http://rru.worldbank.org/Documents/Toolkits/Highways/>
- **State Highway Maintenance Contract Proforma Manual SM032, Maintenance Specifications, Transit New Zealand, 1 March 2005**
http://www.transit.govt.nz/technical_information/view_manual.jsp?content_type=manual&=edit&primary_key=28&action=edit
- **Terms of Reference for the preparation of bidding documents for Performance-based Management and Maintenance of roads in several countries, World Bank (available on CD)**

List of documents relevant for PMMR (2)

- **Cutting Costs and Improving Quality through Performance-Based Road Management and Maintenance Contracts - The Latin American and OECD Experiences , *Gunter Zietlow* (available on CD)**
- **Using Micro-Enterprises to Create Local Contracting Capacity - The Latin American Experience, *Gunter Zietlow* (available on CD)**

Toolkit for Public Private Partnerships in Highways

- **How to make use of the Toolkit**
- **Demonstration of CD**
- **Going through the chapters relevant for PMMR**

State Highway Maintenance Contract Proforma Manual SM032, Maintenance Specifications, Transit New Zealand, 1 March 2005.

- **Contents, Introduction, SOMAC Policy & Document Preparation**
- **Appendix A1: Request for Tender**
- **Appendix A2: Schedule of Prices**
- **Appendix A3: Basis of Payment**
- **Appendix A4: Conditions of Contract**
- **Appendix A5: Operational Requirements**
- **Appendix A6: Specifications**
- **Appendix A7: Appendices**

State Highway Maintenance Contract Proforma Manual SM032, Maintenance Specifications, Transit New Zealand, 1 March 2005. (2)

- Appendix B1: Instructions for Tendering**
- Appendix B2: Schedule of Prices & Basis of Payment**
- Appendix B3: Conditions of Contract**
- Appendix B4: Specifications**
- Appendix B5: Appendices**

State Highway Maintenance Contract Proforma Manual SM032, Maintenance Specifications, Transit New Zealand, 1 March 2005. (3)

- **Appendix C1: PSMC Model - Request for Tender**
- **Appendix C2: PSMC Model - Schedule of Prices & Basis of Payment**
- **Appendix C3: PSMC Model - Conditions of Contract**
- **Appendix C4: PSMC Model - Specifications**
- **Appendix C5: PSMC Model - Appendices**

Terms of Reference for consulting services financed under a World Bank executed Trust Fund

Design and Procurement of long-term pilot contracts for the Performance-based Management and Maintenance of Roads

The role of the consultant consists mainly in the

- Part A: Execution of network-specific technical studies**
 - Task A1: Selection of road sections to be included in PMMR contracts.**
 - Task A2: Definition of service level for each road included in PMMR contracts.**
 - Task A3: Evaluation of Contractor's capacity.**
 - Task A4: Grouping and packaging of road sections by contract**
 - Task A5: Prequalification of Contractors**
 - Task A6: Confidential price estimate for each contract.**
 - Task A7: Estimate and pricing for Emergency works**
 - Task A8: TOR's for supervision of PMMR contracts.**

**Terms of Reference for consulting services financed under a
World Bank executed Trust Fund**

**Design and Procurement of long-term pilot contracts for the
Performance-based Management and Maintenance of Roads**

- **Part B: Preparation of draft bidding documents and design of the procurement process**
 - **Task B1: Definition of common characteristics**
 - **Task B2: Preparation of draft bidding documents**
 - **Task B3: Pre-bid workshops**
 - **Task B4: Support during bidding period**
 - **Task B5: Quality Assurance Support during bid evaluation process**

Cutting Costs and Improving Quality through Performance-Based Road Management and Maintenance Contracts - The Latin American and OECD Experiences , *Gunter Zietlow*

- **Introduction**
- **Brief History of Performance Contracts**
- **Main Reasons for Implementing Performance Contracts**
- **Preparation of Bidding Documents and Bidding Process**
- **Performance Standards and Response Times**
- **Performance Monitoring and Payment Procedures**
- **Implementation Experiences**
- **Lessons Learned and Recommendations for Future Contracts**

Using Micro-Enterprises to Create Local Contracting Capacity - The Latin American Experience, *Gunter Zietlow*

- **Introduction**
- **Type of Micro-Enterprises**
- **Types of Contract Used**
- **Road Maintenance Cooperatives**
- **Road Management Enterprises**
- **Small-scale road maintenance enterprises in Uruguay**
- **Lessons Learnt**

MANAGING THE RISK IN A NEW PERFORMANCE BASED ENVIRONMENT, Mark Owen, Transit New Zealand

http://www.transit.govt.nz/news/content_files/ConferencePaper13_PDFFile.PDF

- **Investigates the current trend to develop and implement performance related specifications into road maintenance contracts and outlines the associated risks in performance contracts in New Zealand**
- **Currently, management of the road network involves three parties, namely the Client, Consultant and Contractor. The paper outlines how the risks are identified, assessed and managed by all three parties**

Good Overview of PMMR

- **International Trends In Procurement Models for Highway Maintenance [PDF], *Tony Porter***
http://www.opus.co.nz/detail_pages/papers/inttrends.pdf
- **Contractual Procedures to Involve the Private Sector in Road Maintenance and Rehabilitation, *Cesar Queiroz***
http://www.balticroads.org/pdf/09_Queiroz_USA_eng.pdf
- **Austrroads Review Of Performance Contracts: The Potential Benefits Of Performance Contracts, *Paul Hardy***
http://www.opus.co.nz/detail_pages/papers/austrroadsreview.pdf
- **Contracting for Road and Highway Maintenance, [PDF], *Geoffrey F. Segal, Adrian T. Moore, and Samuel McCarthy*. March 2003**
<http://www.rppi.org/htg21.pdf>

Country Specific Experiences

➤ New Zealand

- The Hybrid Experience, *Travis Gilbertson ; Barry Stratton ; Ross Anthony.*

http://www.opus.co.nz/detail_pages/papers/hybrid.pdf

- Managing the Road Asset in Australia and New Zealand, *Gary Norwell, Geoff Youdale.*

<http://www.zietlow.com/docs/r296-059.pdf>

Country Specific Experiences (2)

➤ Australia

- Austroads review of performance contracts: the potential benefits of performance contracts, *Paul Hardy*.
- Imperatives in Future Road System Management Improved Road Maintenance Productivity - The Australian Case, *Malcom Frost*. <http://zietlow.com/docs/frost2.pdf>
- A Framework for Assessing Asset Management Performance in Australia, *Florentina Mihai, Neville Binning, Laurie Dowling*. <http://zietlow.com/docs/mihai1.pdf>

Country Specific Experiences (3)

➤ England

- **A Consultant's Perspective of Highway Network Asset Management Practice in England, *Jason Schirnack***

<http://www.opus.co.nz/pubs/trb.pdf>

Country Specific Experiences (4)

➤ USA

- Outsourcing of State DOT Capital Program Delivery Functions, Transport Research Board, Vienna, 2003
http://trb.org/publications/nchrp/nchrp_w59.pdf
- Review of VDOT's Administration of the Interstate Asset Management Contract, December 2000
<http://jlarc.state.va.us/reports/rpt259.pdf>

Unpaved Road Network

- **Performance-based Road Management and Maintenance Contracts for Unpaved Road Network, *Andreas Schliessler*, World Bank, 2000.**

http://www.worldbank.org/html/fpd/transport/rural_tr/bbls/schlie_p.pdf