

Ciudad de México, México



## Capacity Development Plan

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**Produced by:**

C40 Cities Finance Facility (CFF)



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# 1 Background.

This report is presented in the framework of the technical assistance provided by the C40 Cities Finance Facility (CFF) to Mexico city (CDMX), which aims to prepare the investment project for the implementation of the Electric Bus and Bicycle Corridor on Eje 8 Sur. Mexico City and the CFF agreed to collaborate in the technical and financial structuring of the project, which will contribute to reducing GHG emissions, improve the city's resilience to climate change, and provide economic and social benefits to the city, and especially improve quality of life for all inhabitants. It was also recognised the need for strengthening capacities of Mexico City's staff to overcome the lack of experience on electromobility, introduce best practices, and establish standard procedures to ensure replicability in future sustainable, low-carbon and climate-resilient infrastructure projects. Furthermore, the capacity development component of the CFF is a fundamental process that aims to ensure the ownership by the city administration in preparing the Eje 8 project.

The CFF Capacity Development Framework encompasses the three levels of capacity development distinguished by GIZ, but adapted to the context of project preparation: (1) individual performance, (2) organizational development, and (3) interorganizational coordination and cooperation. In addition, the understanding of the different links and synchronization among these levels generate opportunities for further actions that contribute to the development and management of infrastructure projects. The CFF definition for these three levels are:

**(1) Individual performance:** Refers to human capacity development related to individual abilities (skills and competences) to act efficiently and effectively in a professional function.

**(2) Organizational development:** Refers to the organizational performance of city administrations, which depends on a large degree on its structures, processes, legal framework, rules, and work culture.

**(3) Interorganizational coordination and cooperation:** Relates to the ability of a city administration to effectively engage with external actors (e.g. other levels of government tiers, development agencies, and the civil society).

Similarly, the Capacity Development Process consists of four steps: i) capacity assessment process, ii) capacity development plan, iii) implementation of capacity development plan, and iv) evaluation of capacity development. This report focuses on the first two steps:

 **The capacity assessment process**, which aims to analyze the existing capacities and identify potential gaps that are or may be preventing the realization of the project at all three levels of capacity development; and

 **The capacity development plan**, which draws on the assessment results to formulate and suggest interventions to effectively address existing capacity gaps. The plan includes a mix of instruments by capacity levels, but not limited to, the following:

- *Individual:* on the job training provided by highly qualified national and international experts, training courses, seminars, workshops, exchanges with other cities, coaching and mentoring of senior professionals, e-learning courses, study tours and exchange programs.
- *Organizational:* carrying out studies for improving organizational performance, and expert advice.
- *Interorganizational:* expert advice, policy advice for better coordination and communication with key stakeholders, fostering participation in networks and city exchanges through C40's thematic networks and/or enabling the participation and conferences and networking events.

The CFF envisions the following **capacity development outcomes** from the support provided to city administrations:

- 🇪 The departments responsible for the project and their staff have increased technical capacities and skills in project preparation.
- 🇪 The responsible departments within the city administration have increased managerial and financial capacities necessary to mobilise innovative climate-related finance instruments.
- 🇪 Cooperation and communication among the city administrations and relevant organizations and networks are strengthened.
- 🇪 Cities have applied and institutionalised appropriate methodologies and processes for effective project preparation.

The technical support and capacity development activities will be supported by the CFF, with the active participation of municipal stakeholders (other relevant stakeholders might be invited) involved in the technical and financial structuring of the project.

## 1.1 Main actors involved.

The main actors involved in the capacity development activities are the following:

### 🇪 CFF

CFF is a joint initiative between Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH and C40 Cities Climate Leadership Group (C40). Its goal is to facilitate access to financing for climate change adaptation and mitigation and resilience projects in cities. CFF provides technical assistance for project preparation, which is interlinked with capacity development and knowledge sharing activities to ensure the ownership of the project and the development of others bankable projects in the future. It also facilitates the link between cities and investors, coordinating with different financial institutions (public and private).

### 🇪 Mexico City

The Secretaría de Movilidad (SEMOVI) and Servicio de Transportes Electricos (STE) are responsible for preparing, developing, implementing and managing the supported project on the Eje 8 Sur. Therefore, the CFF capacity development activities are mainly focused on these two organizations, however due to the complexity of the project, which requires inter-institutional coordination, other entities will also be involved. For instance: Secretaría de Desarrollo Urbano y Vivienda (SEDUVI), Secretaría de Gobierno (SEGOB), Secretaría de Obras y Servicios (SOBSE), Agencia de Gestión Urbana de la Ciudad de México (AGU), Ministerio de Finanzas (SEFIN) y Secretaría de Medio Ambiente (SEDEMA).

- **Secretaría de Movilidad (SEMOVI):** Responsible for promoting, organizing and regulating the development of the urban mobility in Mexico City. Its functions include to planning public transport projects and coordinating the inter-institutional organization for the development of these projects. Likewise, it is responsible for managing all routes through the corridor Eje 8 Sur.
- **Servicio de Transportes Eléctricos (STE):** Organization responsible for the administration and operation of electric transport systems in the Mexico City. It is also responsible for developing the studies, construction and, in some cases, operation and maintenance of new electric transport lines in the city. It is involved in the project preparation of the Eje 8 Sur by providing critical review of the technical and operative components of the project.

## 2 Methodology.

The CFF has developed a systematic methodology for the capacity assessment, which analyses existing capacities against needed core capacities<sup>1</sup> in the context of project preparation to determine capacity gaps that serve as an input for formulating the capacity development plan. This plan includes responses to address those capacities that could be strengthened and/or optimized to develop the supported project.

The capacity assessment methodology encompasses diverse methods of consultation (self-assessments and external evaluations) to complement and validate results regarding capacity gaps. These methods are:

**1) A SWOT analysis workshop** with the interdepartmental Project Implementation Unit (PIU). The SWOT exercise focuses on analysing existing and required capabilities for project development, through an understanding of the strengths, weaknesses, opportunities and threats of organizations and individuals involved in the project.

The workshop begins with a presentation of the SWOT tool, and subsequently participants are divided into working groups to analyse the following topics:

-  Project planning (incl. project work plan).
-  Project Management.
-  Communication strategy for the project (involving all relevant actors).
-  Structuring the project financing and funding.

Finally, a discussion is held with all participants for presenting the results of each group, reconciling different points of view on the results, and identifying the most relevant findings, in order to develop a final joint SWOT analysis.

**2) Interviews with representatives** of the interdepartmental PIU in the city administration (e.g. directors, deputy directors and managers). The objective of these interviews is to allow a more detailed discussion on some of the main conclusions reached in the SWOT analysis workshop. The list of core capacities in Annex 5 aims helping as a guideline to develop additional questions during the interviews.

**3) A brainstorming workshop** to discuss possible interventions to address the capacity gaps identified in the SWOT analysis (particularly, those that are related to the weaknesses and threats of the issues of interest) and with the interviews. Both, the interviews and the workshops provide ideas and opinions of professionals who work in the city administration on a daily basis. However, since these assessments may be subjective, or too personal, the process of capacity evaluation is also supported by other external means of assessment to understand and validate findings.

#### 4) Means of external assessment:

The external means of the CFF capacity assessment are the following:

-  Feedback from of international technical experts assigned to the project.
-  Feedback from the CFF Senior Project Advisor (SPA) based in the city to support the project.
-  Revision of project documents to understand the in-house technical, and financial capacities to undertake pre-feasibility studies, and develop the project business model.

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<sup>1</sup> This list of core capacities is only used as a reference (see Annex 5).

The results of all methods are summarized and interpreted. They are also classified according to the three levels of capacity development (individual, organizational, and interorganizational), and areas of needs for project development. Subsequently, a draft for the capacity development plan is prepared. The CFF team includes possible interventions with instruments, considering also suggestions from participants, to respond to the identified capacity gaps in the areas of needs. The final version of the capacity development plan is revised for the CFF team to be presented to the city administration in order to jointly agree on it and follow the next steps for the implementation of capacity development activities.

It is likely that the capacity development plan combines short- to medium-term actions (one year) with quick-impact actions, which should be interlinked and aligned with the timing and technical activities of the project work plan. In case that some capacities needs are related to broader issues within city administration that are beyond the scope of project preparation -technical assistance of the CFF - a list of activities will be provided in a separate table, as a reference for the city.

### 3 Assessment process and results.

An international expert on capacity development visited Mexico City for two days (on the 24th, and 25th of April 2017) to conduct the workshops and interviews with the support of the Senior Project Advisor (SPA). The SWOT analysis workshop took place on the first day, and the brainstorming workshop on the second day; while the individual interviews were carried out during both days. This was carried out slightly differently to the initial plan due to the limited time to coordinate the activities with the availability of interview participants.

The results from all means of assessments (workshops, interviews, and feedback from experts) were summarized and organized by using the three levels of capacity development. In addition, the expert took a first attempt to relate all inputs, and cluster them by areas of needs (see Annex 3 and 4). However, the capacity development plan includes mainly the most relevant information regarding the capacity gaps related to the project preparation phase. For instance, capacity needs on public policy, or structural organizational changes were not considered.

#### 3.1 Interview Process and results.

Seven individual interviews were conducted with city officials from the main partner organizations involved in the project Eje 8 Sur; three of them were with representatives of the Secretaria de Movilidad and the other four with representatives of the Servicios de Transportes Eléctricos. The interview lasted for a duration between 20 and 40 minutes. Furthermore, the questions on capacity needs were related to the following project areas: project scoping, political endorsement, communication strategy, project management, legal framework, pre-feasibility studies, mobilising financial resources, and establishing partnerships (more details in Annex 5). The list of interviewees appears in Annex 2.

The expert identified three main areas of needs mentioned by city staff (more details in Annex 3):

1. The legal framework - for recruiting staff for the project with technical expertise.
2. Project management - limited time dedicated from city staff to manage the project.
3. Social communications – civil society participation on project development.

### 3.2 Workshop results.

Seventeen representatives from SEMOVI, STE, and SEDEMA participated in both workshops. The first workshop combined the SWOT analysis methodology, and a brief brainstorming discussion on capacity needs regarding project preparation, financing and management.

The expert focused particularly on the weakness and threats to identify the most critical capacity needs to be strengthened (see details in Annex 4). The participated highlighted the following concerns:

-  Lack of communication between the managerial departments, transport operators, and civil society.
-  Resistance from residents living along the corridor to project development.

**Figure 1: Participants in the SWOT workshop, working in groups and conclusions.**



During the second workshop facilitated by the SPA, the city staff had the opportunity to provide suggestions regarding feasible capacity development measures or interventions. Participants gathered ideas on potential technical and administrative activities (see details in Annex 4).

Finally, it is worth mentioning that the participation was very active and dynamic during all activities.

### 3.3 Means of external assessment.

The results from the self-assessment, or internal evaluation of representatives at city administration were consolidated with other external means of assessments, such as:

-  Feedback from an international technical expert (from GOPA consultancy) assigned to the project, and the CFF SPA, both based in the city administration, contributed to assessing capacity needs on the following project areas: project scoping, political endorsement, communication strategy, project management, legal framework, pre-feasibility studies, mobilizing financial resources, and establishing partnerships. These are the same topics used as a guideline for the interviews. An additional important finding from the SPA was the capacity need of city administration to involve the private sector in the development of the project (e.g. via a public-private partnership).
-  Revision of project documents to understand the in-house technical and financial capacity to undertake pre-feasibility studies, and develop the project business model.

The results of all methods were summarized and interpreted. The expert organized them according to the three levels of capacity development, and areas of needs for project development.

## 4 Capacity development plan.

The capacity development plan was based on the analysis of results from the diverse assessment methods. It presents the possible interventions with their instruments, such as workshops, training, on-the-job support, to respond to the identified capacity gaps. The preparation of the plan considered the initial draft prepared by the expert of capacity development from GOPA consultancy.

The results were organized in different tables. The table A represents **the CFF capacity development plan**, which includes the areas of needs and interventions that are interrelated with CFF's technical assistance activities for project preparation. This plan combines short- to medium-term actions (one year) with quick-impact actions. An additional activity list with suggested dates was developed to facilitate the visualization and monitoring of the plan in Table B. It is important to mention that the limited time for the CFF cooperation has also determined the selection of activities for the plan.

The final version of the plan has been revised by the CFF team in Mexico and a representative of SEMOVI to be formally presented to city authorities with the objective of obtaining their approval, and defining the following steps for the implementation of activities.

The CFF capacity development plan indicates areas of needs, objectives, suggested capacity measures, suggested participants that will benefit most from each measure (e.g. STE, SEMOVI, SEDEMA), and responsible person and/or organization (e.g. CFF, GIZ, C40).

Furthermore, the CFF supports the coordination and management (including part of the logistics) of most of the activities in the plan in cooperation with partners in the field of capacity development. For instance, the C40 network and working groups, the Inter-American development Bank (IADB), the Global Green Growth Institute (GGGI).

The CFF requires the support from Mexico City's government and its agencies to implement capacity activities in the following aspects:

-  The provision of training venues and equipment. In some case, the GIZ country office in Mexico can facilitate with meeting space.
-  Facilitating site visits and allow absences to travel to city staff involved in the project.
-  Access to workstations in case of software installation.
-  Access to relevant data and information for the project (e.g. legal, institutional, planning documents).

It should be mentioned that some capacity development activities had been carried out, or planned prior to the development of the assessment and the current plan. These activities are:

-  Production of a technical note on the advantages and disadvantages of sharing lanes between buses and bicycles.
-  The participation of one city representative involved in the project, at a conference in London in April 2017 on sharing international experiences of electric bus systems.
-  Workshop on how to evaluate the Environmental Impact of Transport Projects (estimation for GHG emissions) organized by C40.

These activities were supported by the C40 networks, and they have already been included in the capacity development plan.

In addition, a third table (Annex 6, Table C) is presented with the capacity gaps that go beyond cooperation with the CFF, as they involve broader issues within the city administration, and/or require more time for their implementation. This table can serve as a reference to city authorities to strengthen these capacities, and to overcome the challenges within the municipal administration in later phases of the project (e.g. design of details and construction, implementation, operation, etc.).

#### 4.1 Summary of the suggested measures.

In summary, the Capacity Development Plan suggests activities that 1) allow the city officials to learn about and understand the studies, technologies, financial instruments and legal schemes that will be introduced in the project, 2) create capacities to assess sustainability measures, 3) establish the appropriate network of stakeholders and 4) develop information key to deliver the current phase of the Eje 8 Sur project.

According to the three levels of capacity intervention, at the individual development level, most of the activities are related to preparing city officials to understand the technical details of the new technologies. These include workshops on electric buses technology, assessment on reduction of emissions, on-the-job support to understand legal and financial aspects, and site visits to exchange operational strategies for the corridor. Similarly, at the organizational level, activities continue to focus on the previous topics, although in this case they are aimed at creating capacities at a wider, organization level. Finally, at the level of inter-organizational coordination and cooperation, the activities proposed focus on identifying the relevant stakeholders involved in the project, establishing effective channels of communication and information sharing, and implementing strategies such as Transit Oriented Development that involve multiple agencies and levels of government.

In terms of the participants proposed and responsibility to conduct each activity, it should be noted that the selection is based on the interviews with city officials and inputs provided by the SPA. CFF an C40 are involved in the design and development of each activity providing feedback, materials, contact information, and leading the sessions as considered appropriate.

The following tables describe in detail the activities included in the Capacity Development Plan and suggested dates (Table B).

**Table 1. Identified capacity needs and suggested capacity development measures in Mexico City.**

No	Identified Capacity Needs (based on assessment results)	Objectives	Suggested Capacity Measures (including means and level of intervention)	Managed by	Proposed participants
<b>INDIVIDUAL DEVELOPMENT</b>					
1	Capacity to understand different alternatives for shared streets (bus-bike lanes)	To ensure that government officials understand the pros and cons to different shared streets alternatives	On-the-job support to project-related activities (Production of technical note on the advantages of sharing lanes between buses and bicycles)	GIZ (Gustavo Jiménez + Andrés Chaves GOPA)	SEMOVI, STE

No	Identified Capacity Needs (based on assessment results)	Objectives	Suggested Capacity Measures (including means and level of intervention)	Managed by	Proposed participants
2	Capacity to understand demand studies	To understand the fieldwork and methodology to assess the passenger demand along the corridor	On-the-job support to project-related activities (SPA delivered a presentation and explained results and received feedback)	GIZ (Gustavo Jiménez + Andrés Chaves GOPA)	SEMOVI, STE
3	Capacity to understand and identify financial options for sustainable and zero emissions transport projects	To understand the financial options and schemes to develop zero emissions transport projects	Participation at conference/event (group of high-level officials to attend the Bus Academy workshop in London, visit TfL and take the Green Transport Seminar organized by C40). On-the-job support and coaching.	GIZ / C40 (Gustavo Jiménez)	STE
4	Capacity to evaluate social and environmental impacts in transport projects	To measure the environmental impact for transport projects based on C40 GHG tool	Group training courses (workshop on how to evaluate the Environmental Impact of Transport Projects -estimation for GHG emissions-)	C40 / GIZ (Aris + Gustavo Jiménez)	SEDEMA + SEMOVI + STE + SOBSE
5	Capacity to assess E-bus technologies	To determine the most suitable technology for the Eje 8	Technical Workshop (bus technology and conceptual framework)	GOPA / GIZ (Grütter + Gustavo Jiménez)	STE, SEMOVI, MetroBus, M1, SEDEMA, SEMARNAT, NAFIN, SENER, CONUEE
6	Capacity to understand and analyse the range of technology options, technical, and	1) To identify and address barriers and opportunities to implement electromobility projects, focusing on the financial, legal,	Group training course/Technical/Financial workshop (to promote electromobility in secondary cities - WRI congress-)	GIZ / WRI / C40 (Gus Jiménez, Marco Priego, Aris Moro)	Secondary cities in Mexico + SEMOVI + STE + SEDEMA

No	Identified Capacity Needs (based on assessment results)	Objectives	Suggested Capacity Measures (including means and level of intervention)	Managed by	Proposed participants
	financial support available for secondary cities	and technical support available. 2) To understand the different technologies available in the market for E-buses that can be implemented in secondary cities			
7	Capacity to analyse different bus technologies, bus companies, and share experiences with other European transport authorities	To learn about bus technologies, share operational and financial experiences with European counterparts	Participation at conference/event (group of high-level officials will attend the Bus World Conference in Brussels and the ZEUS event organized by UITP)	GIZ / C40	STE, SENER
<b>ORGANIZATIONAL DEVELOPMENT</b>					
8	Capacity to understand transport analysis model	To understand how transport models work and their application to Eje 8 Sur	Group training course (Seminar on the process of developing transport models and different options for implementation)	IDOM / GIZ	SEMOVI, STE, SEDUVI, SEDEMA
9	Capacity to identify and evaluate the different institutional and financial options	To revise the feasible institutional and financial options for the Project	Technical/Financial Workshop (on the Institutional-financial scheme for Eje 8). On-the-job support and coaching (ongoing)	GOPA / GIZ (Antonio Huerta + Gus Jiménez)	SEDEMA + SEMOVI + STE + SOBSE + SEFIN

No	Identified Capacity Needs (based on assessment results)	Objectives	Suggested Capacity Measures (including means and level of intervention)	Managed by	Proposed participants
10	Capacity to assess E-bus technologies	To present a conceptual framework on E-buses (general characteristics of technologies, investment, operational and life cycle costs, power management and feeding schemes, preventive maintenance, vehicle availability, etc.).	On-the-job support to project-related activities (Seminar E-bus technologies for the Eje 8)	GOPA / GIZ (Grütter + Gustavo Jiménez)	STE, SEMOVI, MetroBus, M1, SEDEMA, SEMARNAT, NAFIN, SENER, CONUEE
11	Capacity to assess transport tariffs	To advise transport officials on the technical and financial aspects to better establish transport fares	On-the-job training for middle level technical and financial staff on analysis of fares, journey costs, break-even points and appropriate tariffs.	GIZ / GGG1	STE, SEMOVI
<b>INTERORGANIZATIONAL COORDINATION AND COOPERATION</b>					
12	Capacity to identify relevant stakeholders involved in the project	To identify the main stakeholders for Eje 8 for planning and financing the project	Group training activity (Workshop on Stakeholder Mapping)	GIZ (Gustavo Jiménez + Eliana Silva)	STE, SEMOVI, SEDEMA
13	Capacity to generate interinstitutional information coordination	To develop a database with project deliverables and key information to ensure a good communication between stakeholders.	On-the-job support to project-related activities	GIZ (Gustavo Jiménez + Nélida Escobedo)	STE, SEMOVI, SEDUVI, SEDEMA

No	Identified Capacity Needs (based on assessment results)	Objectives	Suggested Capacity Measures (including means and level of intervention)	Managed by	Proposed participants
14	Capacity to understand international cooperation projects	To understand how international cooperation projects work and how the city might apply that knowledge to implement similar projects	On-the-job support to project related activities	GIZ (Gus Jiménez + Nélida Escobedo)	SEMOVI
15	Capacity to incorporate TOD measures into transport projects	To learn from local and international experiences to foster the transit oriented development along corridors in Mexico	Workshop on Urban Development Planning, TODs	GIZ / IDB (Gus Jiménez + Andrés Blanco)	SEDUVI, SEMOVI, STE, SEDECO, SOBSE, STC Metro, SEDEMA, AEP
16	Capacity to learn and share knowledge and its management	To share and exchange experiences with secondary cities and the wider C40 group	Group training courses (workshops where city officials share their project experiences with the wider group of C40 and secondary cities)	GIZ / C40	SEMOVI, STE, SEDEMA, SEDUVI
17	Capacity to understand Cost Benefit Analysis	To understand the process of developing a CBA and the checklist of studies and documents required to develop it	On-the-job training course for technical planning staff in how to carry out CBAs.	GIZ / GOPA (Gustavo Jiménez + Andrés Chaves)	SEMOVI, STE, SEFIN

**Table 2. List of activities and proposed dates.**

No	Identified Capacity Needs (based on assessment results)	Proposed Date
<b>INDIVIDUAL DEVELOPMENT</b>		
1	Capacity to understand different alternatives for shared streets (bus-bike lanes)	30 February 2017

No	Identified Capacity Needs (based on assessment results)	Proposed Date
2	Capacity to understand demand studies	15 Abril 2017
3	Capacity to understand and identify financial options for sustainable and zero emissions transport projects	10-14 April 2017
4	Capacity to evaluate social and environmental impacts in transport projects	16-17 April 2017
5	Capacity to assess E-bus technologies	7 September 2017
6	Capacity to understand and analyse the range of technology options, technical, and financial support available for secondary cities	11-12 October 2017
7	Capacity to analyse different bus technologies, bus companies, and share experiences with other European transport authorities	23-27 October 2017
<b>ORGANIZATIONAL DEVELOPMENT</b>		
8	Capacity to understand transport analysis model	3 December 2017
9	Capacity to identify and evaluate the different institutional and financial options	29 January 2018
10	Capacity to assess E-bus technologies	6 February 2018
11	Capacity to assess transport tariffs	20 February 2018
<b>INTERORGANIZATIONAL COORDINATION AND COOPERATION</b>		
12	Capacity to identify relevant stakeholders involved in the project	27 July 2017
13	Capacity to generate interinstitutional information coordination	Ongoing
14	Capacity to understand international cooperation projects	31 August 2017
15	Capacity to incorporate TOD measures into transport projects	15 February 2018
16	Capacity to learn and share knowledge and its management	Ongoing
17	Capacity to understand Cost Benefit Analysis	26 February 2018

## 5 References.

Adelphi Consult GmbH, E. Silva and J. Baumann (2017), Capacity Development Strategy. Capacity Development of City Administrations to Mobilise and Access a Broad Range of Financing Instruments, Berlin, 5<sup>th</sup> April.

Adelphi Consult GmbH (2017), Capacity Development Strategy for Mexico City. Capacity Development of City Administrations to Mobilise and Access a Broad Range of Financing Instruments, Berlin, 9<sup>th</sup> March.

CFF (2017), Knowledge Management Opportunities – Mexico City, London, C40.

Jiménez, G. (2017), Plan de Trabajo Eje 8 Sur de la Ciudad de México, Mexico City.

## 6 Annex 1: PowerPoint presentation by consultant in the first workshop.

<p><b>La identificación de necesidades para el desarrollo de capacidades</b></p> <p>Dr. Reinhard Skinner Ciudad de México 24 de abril de 2017</p>	<p><b>La misión</b></p>
<p><b>El objetivo de la misión</b></p> <ul style="list-style-type: none"><li>▶ Identificar las necesidades de desarrollo de capacidades de los integrantes de la UIP (Unidad de Implementación del Proyecto)</li><li>▶ Para la preparación del plan del Proyecto C5 (Quinto Centenario)</li></ul>	<p><b>Metodología</b></p> <ul style="list-style-type: none"><li>▶ Taller (el del día de hoy)</li><li>▶ Entrevistas con los integrantes de la UIP</li></ul>
<p><b>El objetivo global</b></p>  <pre>graph LR; A[Taller y Entrevistas 26-27 de abril de 2017] --&gt; B[Elaboración del Plan de Desarrollo de Capacidades 1-12 mayo de 2017]; B --&gt; C[Implementación de Actividades de Desarrollo de Capacidades Fecha a confirmar con GIZ]</pre>	<p><b>El Taller</b></p>

<h3>Objetivos del taller</h3> <ul style="list-style-type: none"> <li>▶ Que los integrantes de la UIP:</li> <li>▶ identifiquen sus fuerzas y debilidades antes de la preparación del plan del Proyecto 5C</li> <li>▶ Identifiquen posibles intervenciones para desarrollar sus capacidades</li> </ul>	<h3>Producto del taller</h3>						
<h3>El taller: métodos</h3> <ul style="list-style-type: none"> <li>▶ FODA (Fuerzas, Oportunidades, Debilidades, Amenazas)</li> <li>▶ <b>Discusión:</b> posibles intervenciones de apoyo al desarrollo de capacidades</li> </ul>	<h3>Que es el desarrollo de capacidades?</h3>						
<h3>El desarrollo de capacidades</h3> <table border="1"> <tr> <td>El desarrollo de recursos humanos</td> <td> <ul style="list-style-type: none"> <li>• Habilidades técnicas y gerenciales</li> </ul> </td> </tr> <tr> <td>El desarrollo organizativo</td> <td> <ul style="list-style-type: none"> <li>• Adaptaciones de la estructura de departamentos de transporte</li> <li>• Ajustes a los modos operativos</li> </ul> </td> </tr> <tr> <td>Cooperación y desarrollo de redes</td> <td> <ul style="list-style-type: none"> <li>• Compartir los conocimientos entre ciudades</li> <li>• Diálogos con la ciudadanía</li> </ul> </td> </tr> </table>	El desarrollo de recursos humanos	<ul style="list-style-type: none"> <li>• Habilidades técnicas y gerenciales</li> </ul>	El desarrollo organizativo	<ul style="list-style-type: none"> <li>• Adaptaciones de la estructura de departamentos de transporte</li> <li>• Ajustes a los modos operativos</li> </ul>	Cooperación y desarrollo de redes	<ul style="list-style-type: none"> <li>• Compartir los conocimientos entre ciudades</li> <li>• Diálogos con la ciudadanía</li> </ul>	<h3>El Ejercicio FODA</h3>
El desarrollo de recursos humanos	<ul style="list-style-type: none"> <li>• Habilidades técnicas y gerenciales</li> </ul>						
El desarrollo organizativo	<ul style="list-style-type: none"> <li>• Adaptaciones de la estructura de departamentos de transporte</li> <li>• Ajustes a los modos operativos</li> </ul>						
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<h3>Lo que nos dice FODA</h3> <ul style="list-style-type: none"><li>▶ Las capacidades de una organización</li><li>▶ Las capacidades que faltan (y hay que crearse)</li><li>▶ Las medidas de fortalecimiento de capacidades que se deben tomar para<ul style="list-style-type: none"><li>◆ aprovechar las oportunidades</li><li>◆ combatir las amenazas</li></ul></li></ul>	<h3>Ejercicio FODA</h3> <ul style="list-style-type: none"><li>▶ Cuáles son las FODA de su organización en cuanto al Proyecto 5C?</li><li>▶ <b>Enfocamos en:</b><ul style="list-style-type: none"><li>▶ estructurar el Proyecto (técnico, ambiental, social y económico)</li><li>▶ comunicar el Proyecto a los actores interesados (público, sector privado, etc.)</li><li>▶ estructurar financieramente el Proyecto (crear recursos financieros, búsqueda de fondos, manejo de fondos)</li><li>▶ Gerenciar el Proyecto</li></ul></li></ul>
<h3>Gracias</h3>	

## 7 Annex 2: Interviewees in Mexico City.

Name of Interviewee	Position	Agency
Lic. Paula Mercado	Sub-Directora de Planeación y Programas	SEMOVI
Arq. Luis Armando Cuevas	Sub-Director, Registro y Seguimiento	SEMOVI
Arq. Erika Kulpa	Jefatura de Unidad Departamental de Programación	SEMOVI
Lic. Bernardo Gavino	Gerente de Transportación de Trolleybuses y Taxis Eléctricos	STE
Licda. Erika González	Directora de Calidad en Ingeniería, Sub-Gerencia de Innovación Técnica	STE
Lic. Juan Carlos Erazo	Actuario, Sub-Gerencia de Planeación de Transporte	STE
Ing. Juan José Reyes Esparza	Director de Operaciones	STE

## 8 Annex 3: Summary of interviews.

Needs Area	Description <sup>2</sup>
<b>INTERORGANIZATIONAL COORDINATION AND COOPERATION</b>	
Legal framework	What is needed is the possibility to recruit staff without having to seek trade union approval. With this it would be possible to demand better performance from the workers.
Communication (political)	We need to know how to make politicians understand that the project benefits everyone and not to oppose it.
<b>ORGANIZATIONAL DEVELOPMENT</b>	
Management	The project needs full-time management (or close to full-time). At present managers need to deal with several other matters in their departments which take priority over the project.
	There needs to be an overall institutional analysis of SEMOVI and STE so that they can function more efficiently.
Personnel	More qualified personnel to carry out studies. (See more below).
<b>INDIVIDUAL DEVELOPMENT</b>	
Financing	SEMOVI's general administrative staff would benefit from training in how to identify and obtain international financial resources. According to an interviewee from SEMOVI, at least six persons should be trained so that there are substitutes when one or more are unavailable.
	A plan is needed for an increase in bus fares which provide financing for the new staff who will have to be hired as well as persuading Mexico City's top decision makers (Jefatura del Gobierno de la Ciudad de México) to authorise it.
Social communication	Most middle level officials have a technical background without any experience or skills in involving the public in planning or in effectively conveying to them the benefits of their projects. The result has been (or could be) rejection or lack of cooperation on the part of the public.
Planning	Better understanding of how to plan major projects.
	How to carry out transport studies, journey matrices and transport modelling (systems).

<sup>2</sup> It should be noted that the descriptions intend to reflect the interviewees' statements, not the opinions of the consultant.

<p>Undertaking studies</p>	<p>How to carry out the following types of studies:</p> <ul style="list-style-type: none"> <li>● Sectoral analysis (including analysis of tariff structures)</li> <li>● Institutional analysis</li> <li>● Environmental impact analysis</li> <li>● Socio-economic impact analysis</li> <li>● Analysis of alternative technologies</li> <li>● Cost-benefit analysis</li> <li>● Financial analysis</li> <li>● Land use analysis</li> <li>● Climate change scenarios and forecasts</li> <li>● Analysis of project gender impacts.</li> </ul> <p>Two years ago, there was a demand study but it needs to be updated.</p> <p>Staff who can carry out studies is very limited and more are needed.</p>
<p>Knowledge of the market</p>	<p>Few manufacturers of the new technology (electric buses) are known in Mexico City. More should be known so that there are more options to choose from when procuring. It is also important to have the chance to test their products so that we can be sure we're spending the city's money wisely.</p>
<p>Skills of operational staff</p>	<p>Driving the buses is easy but training is needed in how to treat the new technology correctly as it is more fragile than the existing one (e.g. it has a higher plastic and carbon fibre content).</p>
	<p>Some skills required for the maintenance of e-buses (e.g. charging batteries).</p>

## 9 Annex 4: Summary of workshop results.

### 1.2 Workshop SWOT analysis (facilitated by the consultant).

Weaknesses	Threats
There are many routes which overlap over short distances.	Resistance on the part of the residents living along the route
Institutional framework: the department can only recruit staff with the approval of the trade union.	Resistance by other (small) transport operators to the electric bus plans.
Informal traders who occupy areas of the future e-bus route.	The time it takes to obtain funding for the buses.
Lack of communication between the department and other transport operators and residents along the e-bus route	Change in local government administration in 2018 (and then a possible lack of support for the project)
The lack of a technical available full-time for the project.	Opposition to the plans by various political groups.
Lack of good filing system and records of work.	Lack of knowledge about the useful life of electric vehicles.
Lack of departmental financial resources.	
Lack of interest in the Project by the Finance Secretariat.	
Credibility and lack of experience of the department regarding implementation of new technology.	
Resource management (time, interinstitutional, human)	
Inter-institutional coordination	

### 1.3 Brainstorming workshop (facilitated by the SPA).

Suggested Training	
Technical / Institutional	Technical / Personal
<ul style="list-style-type: none"> <li>● Infrastructure installation</li> <li>● Operation and maintenance of various types of vehicles.</li> <li>● Transportation modelling (e.g. evaluation of technologies)</li> <li>● Transport planning</li> <li>● Information sharing (open data)</li> <li>● Maintenance management</li> <li>● Battery management</li> </ul>	<ul style="list-style-type: none"> <li>● Operation and maintenance structure</li> <li>● Operation of e-buses, recharging (batteries) and sub-stations</li> <li>● Testing buses</li> <li>● Management of the technical team</li> <li>● Project management</li> <li>● Planning procedures</li> <li>● Maintenance plans</li> <li>● Implementation techniques for the new technology</li> </ul>
Administrative, Financial / Institutional	
<ul style="list-style-type: none"> <li>● Cost recovery methods</li> <li>● Revenue collection systems</li> <li>● How to restructure collective contracts</li> <li>● Fare analysis (STE).</li> <li>● (Financial) resource capture</li> <li>● Sources of financing</li> <li>● Project cost-benefit analysis</li> <li>● Updating of software</li> <li>● Use of social media to share ideas about the project</li> <li>● Assessment of technologies</li> <li>● Project management</li> <li>● Institutional coordination</li> <li>● Analysis of journey costs and points of equilibrium.</li> </ul>	

## 10 Annex 5: Guideline for the interviews.

CD Areas (Specific Competencies)	Questions
<b>Project Scoping</b>	
1. Preparing project concept, including basic design and location.	1a. How many project designs have you worked on? (Check for project concept) 1b. Please name it / them.
2. Incorporating climate change aspects into the project concept & design.	(If YES to 1) 2a. Did you incorporate any aspects of climate change into the design? 2b. (If so) What were they?
3. Incorporating gender perspective into the project concept.	(If YES to 1) 3a. Did you incorporate any aspects of gender into the design? 2b. (If so) What were they?
4. Mitigation: Estimating project-level GHG emissions reduction assessments.	4. NA
5. Resilience/Adaptation: Using CRAFT tool to assess resilience aspects and impact on cities overall resilience.	5. No suitable question devised
6. Incorporating measures that can benefit the urban and socio-economic development.	(If YES to 1) 6. Have these (engineering / physical?) projects included social and economic development aspects? If so, what were they?
<b>Project Structuring</b>	
7. Defining project phases.	Has your department planned a similar project to this project before? What was it?
8. Packaging project components and activities.	No suitable question devised
9. Identifying programme/project-level benefit indicators.	Are you familiar with programme/project-level benefit indicators? How have you used them?
10. Drafting and continuously monitoring a work plan including timelines and responsibilities.	What arrangements are in place for M&E of activities in your department? Do they work well?
11. Defining objectives, outcomes, activities and project milestones	Does your department use the logical framework for planning projects? If not, which framework is used?  How do you decide on objectives and outcomes?
<b>Political endorsement</b>	
12. Identifying and involving diverse municipal departments.	Which other municipal departments has yours worked with in projects? Which ones were they? Did the cooperation work out well? (Explain)
13. Involving and engaging stakeholders from different government tiers.	No suitable question devised
14. Understanding the governance structures at local/regional/national level.	No suitable question devised

CD Areas (Specific Competencies)	Questions
15. Identifying the key decision-makers at local (e.g. mayor) and national level.	<p>When it comes to deciding on which projects to approve in Mexico who decides?</p> <p>Are there any decision makers at national level which affect the selection of projects carried out in Mexico?</p>
16. Engaging communities and civil society.	Do projects in Mexico involve communities or civil society? How? Why not?
17. Understanding internal policies and agendas to move the project forward.	No suitable question devised
18. Overseeing political and institutional project-related risks	How does your department assess and monitor risks in projects it carries out?
<b>Communication strategy</b>	
19. Stakeholder mapping.	<p>When your department prepares a project does it consider the possible reactions of all stakeholders?</p> <p>Explain how. Why not?</p>
20. Coordinating a communication strategy by project phases.	Do projects which your department carries out have communications strategies? What do they consist of? What is the purpose?
Establishing regular community dialogues on specific topics – e.g. community participation / engagement mechanisms	<p>Does your department hold any regular community dialogues on development projects (or anything else)?</p> <p>Examples. What for? Successful?</p>
<b>Project Management</b>	
Setting up a Project Implementation Unit (PIU), and designing an inter-departmental and inter-agency project steering structure.	<p>Does your department have experience in setting up or working in any PIU? (Example).</p> <p>What experiences with inter-institutional coordination?</p>
Managing the PIU and setting up working groups. Including potential Indicators to track gender inclusion in the PIU.	<p>What have been your experience with PIUs? What has worked well and what not? What about WGs?</p> <p>Has there been any attempt to ensure gender inclusion in the PIUs? Has this been tracked? How?</p>

CD Areas (Specific Competencies)	Questions
Monitoring roles and responsibilities and establishing work dynamic (meeting frequency, communication protocol, % of time participating in project activities, etc.).	How are PIU activities monitored (roles and responsibilities)?
Cooperating and collaborating with other departments.	See Political Endorsement above.
Identifying synergies with other departments.	See Political Endorsement above.
Identifying individual skills of project team members.	No suitable question devised
Identifying in the work plan the activities where it is needed to build capacity	How have you identified capacity development needs in your department's projects?
Legal Framework	
Designing a financial-institutional arrangement to implement and operate the project (e.g. PPP).	How have your projects been financed and operated?  Any PPPs?
Market Sounding if PPP.	No suitable question devised  How does the use of PPPs affect your project plans?
Market Sounding if PPP.	No suitable question devised
Land acquisition for project.	When land has to be acquired o a project how is this done (are there protocols? What are they?)?
Resettlement: green design options for resettlement areas	Do any projects require resettlement?  Do designs for resettlement areas take into account green issues?
Coordinating data collection for studies.	Who collects data for the project studies?  Who manages data collection?

CD Areas (Specific Competencies)	Questions
<b>Pre-feasibility studies</b>	
<p>Prioritising key studies and elements of each study/ assessment/analysis.</p> <ul style="list-style-type: none"> <li>● Demand Analysis</li> <li>● Sectoral Analysis (incl. operative design and analysis of fee structure)</li> <li>● Institutional assessment.</li> <li>● Environmental Impact Assessment.</li> <li>● Analysis of alternative technology.</li> <li>● Socio-economic assessment.</li> <li>● Cost-Benefit Analysis.</li> <li>● Financial Assessment.</li> <li>● Land use assessments.</li> <li>● Environmental and social assessments.</li> <li>● Climate Change Scenarios and projections.</li> <li>● Assessment of the impacts of the projects on genders.</li> <li>● Preparing ToRs for pre-feasibility and feasibility studies.</li> <li>● Preparing climate, environmental, social and gender assessments.</li> </ul>	<p>(Pre-) feasibility studies require a range of different specialised skills. Which of the following does your department have? (Use list on left)</p>
<p>Assessment of PFS results: sufficiency of green outcomes, efficiency of green finance.</p>	<p>You have staff who are able to assess if the subjects of green outcomes and green finance have been taken into account sufficiently in the PFS? Explain.</p>
<b>Mobilising and managing financial resources</b>	
<p>Policy &amp; Strategy for funding &amp; Finance: “Green” Finance Options.</p>	<p>How would you rate the level of financial skills in your organization? Explain</p>
	<p>Does your organization know what the potential sources of financing for environmental projects are? (National / international) Does it know how to access these funds (how to apply? Requirements?)</p>
<p>Project Financing:  Analysis local debt ceiling, according to size and structure of the existing debt.</p>	<p>No suitable question devised</p>
<p>Screening financial options: domestic and external sources:</p>	<p>No suitable question devised</p>
<p>Selection of preliminary financing strategy for priority projects: structure for “green” finance options</p>	<p>No suitable question devised</p>

CD Areas (Specific Competencies)	Questions
Understanding the financial architecture to access to local, regional and national funds.	No suitable question devised
Identifying financial resources available at the national level. Identifying on external sources: Analysing alternatives of capital external revenues (e.g. loans, types of bonds, PPP, guarantees). Financial closure if PPP.	What are the main sources of project funding you use at present? Do you foresee any new sources in future?
Coordinating a strategy to get access to the climate funds (e.g. GCF), and other climate mechanisms.  Understanding requirements to apply for international funds (climate funds), MDBs banks.	No suitable question devised
Understanding and being aligned with international safeguards of financial organizations.  Understanding the triggers to leverage finance nationally and internationally (e.g. matching funds).	
Preparing documents to apply for external sources.	
Project Funding: Budget allocation.	No suitable question devised
Planning framework for revenue mobilisation & expenditure management (including pricing and sharing of revenues/costs if more than one stakeholders): Pricing incentives for green outcomes.	Do you think there are any special means of raising funds for green projects (locally or externally)? (e.g. environmentally based taxes, green bonds)
Community consultation on finance issues (e.g. on bond issuance/local tax/in kind contributions): willingness to pay for green/environmental outcomes.	Do you involve the public in deciding on how to finance projects? (e.g. what they would be willing to pay)
Designing a financial structure to raise revenues from the project	Have you thought about how the project could raise its own revenues? (Explain)
Projecting local revenues that can be used to pay for future debt service (cost-recovery approach).	No suitable question devised
Managing financial resources, including budget monitoring and reporting	No suitable question devised
Business Model: Structuring a financial scheme for the project.  Structuring a documented business case for the project.  Preparing a project business model	What experience does your organization have in writing business plans (project funding proposals)? (Explain) Would these skills be available to the present project?

CD Areas (Specific Competencies)	Questions
Identifying areas of activities in the work plan to involve other stakeholders/partners (e.g. for technical assistance).	No suitable question devised
Pitching organizations/ philanthropies to get support for project preparation.	Does your organization ever get funding contributions from the private sector, philanthropic organizations, etc? For any part of the project (preparation, implementation, maintenance, monitoring, evaluation) (Examples)
Organising working tables for coordinating partnerships	No suitable question devised
Accomplishing the procurement process and procedures to revise, assess and compare tender documents.	No suitable question devised
Procurement of detailed design if not a Design-Build (DB) <sup>3</sup> (bidding documents/bidding/bid assessment)	No suitable question devised
Procurement of construction including detailed design if DB contract.	No suitable question devised
Supervision & progress payment of detail design if not DB contract: monitoring of green procurement outcomes.	No suitable question devised
Selecting procurement modality: green procurement options, including gender aspects into tender documents.	Do tender documents include requirements for compliance with environmental or gender norms?
Considering international practice for transparent and competitive tender process.	Do your tender procedures apply international standards?

Note: Some questions of the list were selected according to their relevance and time available for interviewees.

<sup>3</sup> Design-build (or design/build, and abbreviated D-B or D/B accordingly) is a project delivery system used in the construction industry. It is a method to deliver a project in which the design and construction services are contracted by a single entity known as the design-builder or design-build contractor.

## 11 Annex 6: Beyond the CFF. Additional capacity development activities.

As it was mentioned in the body of this document, CFF is not able to support all capacity gaps. For instance, changes in the employment contract to allow hiring new staff without having to seek trade union approval is clearly not part of the cooperation between the city of Mexico and the CFF. In other cases, the interventions of some capacity needs require more time and resources. Therefore, the CFF suggests to the city administration the revision of these interventions, and a prioritization criterion as follows:

1. The selection of interventions that are linked to the project development.
2. The consideration of the main concerns mentioned by the PIU during the interviews and workshops. For instance, the legal framework, management, social communication.
3. The comparison between activity cost, and available budget, or other potential city partners interested in supporting capacity development in the field of each intervention.

As a result, Table C includes capacity development activities that could be implemented in the following phases of the project, but currently fall out of the scope.

**Table 3. Capacity development activities that can be implemented in later phases of the project.**

No	Identified Capacity Needs (based on assessment results)	Suggested Capacity Measures (incl. means and level of interventions)	Support required from CFF	Participants
<b>INDIVIDUAL DEVELOPMENT</b>				
<b>ORGANIZATIONAL DEVELOPMENT</b>				
1	Climate change scenarios and projections	Group or individual training courses	Local coordination and logistics	STE, SEMOVI, SEDEMA, SEDUVI
2	Assessment of project gender impact	Group or individual training courses	Identify and hire consultant	SEMOVI, STE, SEDEMA, SEDUVI
3	Project planning and management	Classroom training on <i>Capacity Works</i> for a group of middle level managers in the project's partner organisations.	GIZ	SEMOVI, STE, SEDEMA
4	Data storage and management	On-the-job training course for administrative staff and their managers / supervisors in data storage and management	SPA to coordinate	SEMOVI - STE - SEDEMA

5		Purchase of up-to-date administrative software licences for SEMOVI, STE y SEDEMA.	CFF to purchase	SEMOVI - STE - SEDEMA
6	ToR writing	Advise on how to write ToR for consultants	None	GIZ / WRI / C40 (Gustavo Jimenez, Marco Priego, Aris Moro)
7	Driving and handling electric buses	On-the-job training for bus drivers (future electric bus drivers).	Local coordination and logistics	STE, SEMOVI
8	Electric bus maintenance	On-the-job training for the mechanics and technical personnel responsible for maintaining the electric buses	Local coordination and logistics	STE, SEMOVI
<b>INTERORGANIZATIONAL COORDINATION AND COOPERATION</b>				
9	Participatory planning	Classroom based training courses for middle level managers and planning staff	Identify and hire consultant	SEMOVI, STE, SEDEMA
10	Social and environmental impact assessment (SIAs and EIAs)	Classroom based training courses for technical, social and environmental planning staff in how to carry out SIAs and EIAs.	C40	SEDEMA, SEMOVI, STE, SOBSE
11	Land use analysis	Classroom based training courses for technical planning staff in how to carry out land use analyses. Personal coaching after the training.	Local coordination and logistics	STE, SEMOVI
12	Knowledge sharing and management	On-the-job training for PIU on how to capture lessons learnt for later dissemination (e.g. learning logs, learning reviews)	Local coordination and logistics	STE, SEMOVI, SEDEMA
13	Social communication (gaining stakeholder support)	Drawing up communication strategy to market project to stakeholders	Local coordination and contacts	SEMOVI
14	Environmental and climate change oriented transport planning	Classroom based training courses for middle level planning staff on environmental and climate change oriented transport planning	Local coordination and logistics	SEMOVI, STE, SEDEMA, SOBSE

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