



**Long Term Climate Change Adviser – Emerging Markets Development Advisers
Program (EMDAP)**

**Quarterly Performance Report
October 1 – December 31, 2017**

**Leader with Associate Agreement (LWA)
EEM-A-00-04-00002-00**

**Associate Cooperative Agreement
No. AID-523-LA-16-00001**

Prepared for the United States Agency for International Development (USAID)

Implementing Organization:



Submitted: January 31, 2018

SUMMARY:

This report covers the progress of the 2017-2018 EMDAP Long Term Environmental Policy Adviser, sponsored by USAID/Mexico in Mexico City, Mexico during Quarter 1 of FY2018.

VOLUNTEER AND ASSIGNMENT:

EMDAP ADVISER: NAIN MARTINEZ

ENERGY POLICY ADVISER

Mexican Climate Initiative (Iniciativa Climática de México – ICM)

Assignment Period: 11 Months, July 15, 2017 – June 15, 2018

Mr. Martinez serves as a full time EMDAP adviser at the Mexican Climate Initiative (*Iniciativa Climática de México – ICM*). In his role, Mr. Martinez provides technical assistance on issues related to Social Impact Assessment, Community Engagement, Social Management Planning and Indigenous Consultation. The EMDAP Adviser reports directly to Jorge Villareal, Director of Climate Policy of ICM, but also works closely with USAID/Mexico, and maintains linkages with the General Office of Social Impact Assessments and Prior Consultations in SENER (Ministry of Energy).

THIS QUARTER'S ACTIVITIES:

EMDAP ADVISER: NAIN MARTINEZ

During this quarter, EMDAP Adviser Nain Martinez continued his work from the previous quarter, supporting the team of Iniciativa Climática de Mexico with developing a work plan to prevent social conflicts with energy transition policies developed and introduced by the Mexican government. Per his Work Plan (annex 1), one of his goals was to continue providing analysis and review of research trends from an academic perspective that would help develop projects in the field of renewable energy projects in Mexico.

As a result of his analysis and research, Nain contributed to developing three reports with the ICM team that will serve as a foundation for all members of the consortium responsible for implementing the “*Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico*” project. The first report will be structured into the framework of the consortium project and help identify the main concepts, debates and issues around social conflict in renewable energy projects. In addition, it will help identify some of the gaps in the Mexican legislation processes that the consortium might be able to address via equipping members with tools to effectively engage in the political and social discourse.

Report One

This first report entitled “*Debates and key concepts on socio-environmental impacts and social opposition in renewable energy projects*” included explanations of definitions used in the renewable energy projects in Mexico and described some controversies that surround the essential perceptions of the renewable energy policies. The report included standpoints on such views as environmental and social impacts, social perception and acceptance, social and environmental impacts assessment, social benefits, and indigenous communities and social participation.

Report Two

The purpose of the second report was to assess the socio-environment impacts of renewable energy projects in Mexico and help mitigate those negative impacts by creating a source of information for the Group of Social Inclusion for the Energy Transition (GISTE). This report will provide a set of tools

to guide discussion that would be in line with the GISTE's objectives. This report entitled "*Review of public policy instruments focused on assessing and mitigating the socio-environmental impacts of renewable energy projects in Mexico*" identified challenges in the mechanisms used to conduct social and environmental impact assessments, public consultations and social benefits processes.

Report Three

The third report provided recommendations on how to improve the regulatory framework in renewable energy projects in Mexico and was included in the Quarterly Meeting agenda on Social Impacts of Clean Energy Projects during which the following stakeholders participated: USAID, British Embassy, German Agency for International Cooperation (GIZ), Latin American Faculty of Social Sciences (FLACSO), Climate Initiative of Mexico, Civic Collaboration Center (CCC), and university scholars.

The third report entitled "*Reflections on Shared Social Benefits of Renewable Energy Projects*" provides an analysis of the main challenges for renewable energy and what impact they have in creating social conflicts. The report also provided distinction between social benefits and other related components such as counter-benefits and positive social impact, and stipulated what steps should be undertaken to mitigate the contrary social and environmental effects. In addition, the authors of the report reviewed 4 international approaches to a similar issue (UK, Germany, the United States, and Switzerland) and presented the best practices on social benefits transfers.

During this quarter, Mr. Martinez was also working on developing and maintaining relationships with key stakeholders who are involved in Social Impact Assessment, Environmental Impact Assessment, social benefits, and consultation processes. Mr. Martinez developed a schedule and agenda for meetings to present the project "*Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico*" to crucial partners and consumers. Through his participation in those meetings he was able to receive feedback on social conflicts in renewable energy projects from local NGOs, the private sector and individuals. Furthermore, Mr. Martinez participated in meetings organized by the Group of Social Inclusion for the Energy Transition (GISTE) whose main focus is to boost the development of renewable energy projects in Mexico among local and international NGOs, government agencies, political parties, private sector, and academia.

In addition to these meetings, Mr. Martinez participated in regular meetings of the consortium incorporating the **Iniciativa Climática de México** (ICM), **Centro de Colaboración Cívica** (CCC), and the **Facultad Latinoamericana de Ciencias Sociales in México** (FLACSO) in partnership with USAID to develop an implementation strategy for the "*Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico*" project.

CHANGES IN SCOPE OF WORK/IMPLEMENTATION PLAN:

Originally, The EMDAP Adviser was to be embedded in the General Office of Social Impact Assessment and Prior Consultation (SENER), Mexico's Ministry of Energy. However, USAID/Mexico, in collaboration with SENER and in consultation with the adviser, decided to change the host organization to the Iniciativa Climática de México (ICM), which is an intellectual NGO leader in Mexico. The EMDAP adviser's Scope of Work was adjusted to his current role and approved by USAID Mexico.

Mr. Martinez serves as a full-time adviser to Climate Initiative of Mexico (ICM), providing support and technical assistance on issues related to Social Impact Assessments, Community Engagement, Social Management Plans and Indigenous Consultations.

Mr Martinez supports the implementation of the project *“Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico”*. This project aims to address and prevent some of the causes of social conflicts in renewable energy projects in Mexico, through promoting inclusive and participatory practices, within the human rights framework and with a gender perspective.

ACCOMPLISHMENTS:

Mr. Martinez has made daily accomplishments that contribute to the overall objective of his assignment, which is to provide technical assistance to Climate Initiative of Mexico (ICM).

In the table below, Mr. Martinez provides specific accomplishments for this quarter.

Project	Accomplishment
Conduct research and analysis to generate report on <i>“Debates and key concepts on socio-environmental impacts and social opposition in renewable energy projects”</i>	<ul style="list-style-type: none"> Equip the consortium members with tools to effectively engage in the political and social discourse.
Evaluate social benefits in renewable energy projects to generate a report on <i>“Reflections on Shared Social Benefits of Renewable Energy Projects”</i>	<ul style="list-style-type: none"> Findings from this report were included in the Quarterly Meeting agenda on Social Impacts of Clean Energy Projects.
Conduct research to generate a third report on <i>“Review of public policy instruments focused on assessing and mitigating the socio-environmental impacts of renewable energy projects in Mexico”</i>	<ul style="list-style-type: none"> Contribute to expanding GISTE’s capacity to steer discussions on social and environmental impact assessemnts, public consultations and social benefits processes.
Technical assistance to ICM with the <i>“Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico”</i> project	<ul style="list-style-type: none"> Created the decision process for the project that defined how to implement it and which methodologies are most appropriate to use.
Act as a liaison with all stakeholders of the consortium	<ul style="list-style-type: none"> Explaining the details and main objectives of the <i>“Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico”</i> project
Planning the agenda and schedule	<ul style="list-style-type: none"> Increased the visibility and understanding of the ICM project on <i>“Communities and Renewable Energy: development of participatory, inclusive, and transparent renewable energy projects in Mexico.”</i> Establishing a solid relations with the critical NGOs in Mexico

LESSONS LEARNED/CHALLENGES:

- Mr. Martinez had to rearrange his work plan and address and evaluate the roles of social benefits in renewable energy projects and generate a report for the Quarterly Meeting agenda on Social Impacts of Clean Energy Project. This assessment had to be conducted earlier than his plan anticipated.
- Developing trusting relations with the team of the Climate Initiative Mexico (ICM) as well as other stakeholders that are part of the consortium.
- Including various perspectives, developing relations with multiple stakeholders, and keeping priorities well balanced.

To address these challenges, Mr. Martinez stays positive and is more flexible when incorporating business needs to generate products that are useful for the host organization.

GOALS FOR NEXT QUARTER:

In the next quarter of his assignment, Mr. Martinez will continue his involvement with various activities connected with the ICM project. He will continue to liaise with the consortium and other stakeholders to ensure that the project addresses the social conflicts in renewable energy projects in Mexico. It is critical to the success of the consortium's project to prevent some of the causes of the social conflicts. Mr. Martinez will evaluate the performance of mechanisms used by the Mexican government to introduce renewable energy project benefits for local communities. He will focus on cross-checking and comparing international practices to measure social benefits with renewable energy projects against the techniques used in Mexico. Finally, Mr Martinez will create technical inputs referencing the international and local practices in social impacts for the ICM project.

Objective	Timeline
Monitor and Participate in Meetings	November -March
Evaluate performance of mechanisms used by Mexico government to introduce renewable energy projects benefits for local communities	March- June
Compare international and Mexican experiences and practices to measure social benefits with renewable energy projects	March-June

IIE ACTIVITIES**TASKS COMPLETED THIS QUARTER:**

- Organized Volunteer Survey debrief session over Skype with EMDAP Adviser Sean Donovan, who completed his assignment on September 30, 2017.
- Collected the Volunteer Value Reporting System Survey (VVRs) from the Volunteer and Host Institution.
- Completed and submitted the Volunteer Value Reporting System Survey (VVRs) for Implementers.
- Facilitate stipend disbursements.
- Provided ongoing support with any in-country concerns.
- Monitored Mr. Martinez to ensure reports are submitted to IIE/VEGA/USAID in a timely manner.

IIE TASKS FOR NEXT QUARTER:

- Provide ongoing support with any in-country concerns.
- Monitor Mr. Martinez to ensure reports are submitted to IIE/VEGA/USAID in a timely manner.

Photos



Picture 1. Meeting with Consortium representatives from *Iniciativa Climática de México* (ICM), *Centro de Colaboración Cívica* (CCC), and the *Facultad Latinoamericana de Ciencias Sociales in México* (FLACSO).



Picture 2. Meeting with *Rajendra K. Pachauri*, Chairman of the Intergovernmental Panel on Climate Change and Nobel Peace Prize, organized at *Climate Initiative of Mexico* with the *Group of Social Inclusion for the Energy Transition (GISTE)*
(*Nain Martinez: second from left*)



Picture 3. Presentation of the report "*From Brown to Green: The transition of the G20 economies to a low-carbon economy*" prepared by Nain Martinez as part of his literature review.
Meeting organized by the Mexican Ministry of Foreign Affairs.



Picture 4. Meeting with the Group of Social Inclusion for the Energy Transition (GISTE).

Annex 1 – EMDAP Adviser Work Plan

Name: Nain Martinez

Assignment Dates: July 2017 – June 2018

Host Organization: Iniciativa Climática de México (ICM)

Country: Mexico

This is the proposed work plan for the EMDAP Adviser's assignment. The Adviser's role will adapt according to the decisions made by ICM and USAID. The Adviser will be involved primarily in developing projects in the field of renewable energy projects in Mexico.

Key areas	Objectives	Major Deliverables	Status/Timeline
Analysis and Work Review	-Review and identify academic and grey literature in English and Spanish related to social conflicts in renewable energy projects in Mexico	-Database with results of the literature review	July-August/Complete
	Review research trends and theoretical perspectives for project developments in the field of renewable energy projects in Mexico	-Report outlining academic perspectives and theories for project development in the field of renewable energy projects in Mexico	September-November
Relationship Management and Planning	Monitor and Participate in Meetings	- Develop agenda for meetings - Reports outlining challenges related to the Social Impact Assessment, Environmental Impact Assessment, social benefits and consultation processes	November - March
Assessment and Evaluation	Evaluate performance of mechanisms used by Mexico government to introduce renewable energy projects benefits for local communities	-Summery of solutions to improve the design and evaluation process of Social Impacts Assessment (EvIS), and Environmental Impact Assessment (MIA) consultation	March- June
	Compare international and Mexican experiences to measure social benefits with renewable energy projects	Report with inputs to the assessment of methodologies used to estimate social benefits	
Workshop Planning	Coordinate workshops on Social Impacts Assessment (EvIS), Environmental Impact Assessment (MIA)	-Identify main stakeholders and actors with relevant knowledge, experience and involvement in renewable energy projects to	June

	and social benefits for renewable energy in Mexico	participate in workshops	
Other Duties as Assigned	Flexibility and openness to perform research and tasks needed beyond those listed above within mission of the organization		