MÉXICO

ESTADO DE AGUASCALIENTES:

SECRETARÍA DE DESARROLLO ECONÓMICO, CIENCIA y TECNOLOGÍA (SEDECYT)

ESTADO DE GUANAJUATO:

SECRETARÍA DE DESARROLLO ECONÓMICO SUSTENTABLE (SDES)

CLÚSTER AUTOMOTRIZ DE GUANAJUATO (CLAUGTO)

ESTADO DE QUERÉTARO:

SECRETARÍA DE DESARROLLO SUSTENTABLE (SEDESU)

CLÚSTER AUTOMOTRIZ DE QUERÉTARO

ESTADO DE SAN LUIS POTOSÍ:

SECRETARÍA DE DESARROLLO ECONÓMICO (SEDECO)

CLÚSTER AUTOMOTRIZ DE SAN LUIS POTOSÍ (CASLP)

EL PROYECTO PARA EL FORTALECIMIENTO DEL CLÚSTER AUTOMOTRIZ EN MÉXICO

INFORME DE TERMINACIÓN DEL PROYECTO

FEBRERO DE 2024

AGENCIA DE COOPERACIÓN INTERNACIONAL DEL JAPÓN (JICA)

JAPAN DEVELOPMENT SERVICE CO., LTD. (JDS)

WORLD BUSINESS ASSOCIATES CO., LTD.

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FOTOGRAFÍAS



Taller de presentación de los resultados de KAIZEN (Primera etapa) Guanajuato (IECA-American Axle)



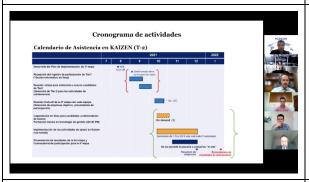
Taller de presentación de los resultados de KAIZEN (Primera etapa) Querétaro (Universidad Tecnológica de Querétaro)



Reunión con la contraparte (sesión de trabajo 2) (Aguascalientes: octubre de 2019)



Segunda sesión del JCC (Querétaro: febrero de 2020)



Sesión informativa de la convocatoria a las empresas Actividades de asistencia en Kaizen en el piso de producción (3ª y 4ª etapa) (Septiembre de 2021)



Actividades de apoyo en Kaizen en piso de producción (Tercera y Cuarta Etapa) Presentación de los resultados finales (Noviembre de 2022)



Cuarta reunión del Comité Conjunto de Coordinación (JCC) (Irapuato: noviembre de 2022)



Capacitación en Japón, marzo 2023 (Ceremonia de terminación, Yokohama)



Capacitación en Japón, abril 2023 (Museo Mazda, Hiroshima)



Capacitación Intensiva en Aguascalientes (Junio de 2023)



Capacitación Intensiva en San Luis Potosí (Septiembre de 2023)



Presentación de resulatdos de KAIZEN en el Estado de San Luis Potosí. (Quinta etapa) (Noviembre de 2023)



Presentación de resultados de Kaizen en el Estado de Guanajuato. (Quinta etapa) (Diciembre de 2023)



Visita a MAZDA de México Vehicle Operation (MMVO) (Salamanca: diciembre de 2023)



Entrega de reconocimiento a Asesores de Kaizen de los 4 estados (Aguascalientes: febrero de 2024)



Quinta reunión del Comité Conjunto de Coordinación (JCC) (Aguascalientes: febrero de 2024)

ABREVIATURAS

Abreviatura	Nombre en español / inglés
ACBO	Agencia para la Cooperación Económica Centro-Bajío-Occidente
AGS	Aguascalientes
AMEXCID	Agencia Mexicana de Cooperación Internacional para el Desarrollo
AMLO	Andrés Manuel López Obrador
AOD	Asistencia Oficial para el Desarrollo
CAD	Comité de Ayuda al Desarrollo
CASL	Clúster Automotriz de San Luis Potosí
CDMX	Ciudad de México
CL	Clúster
CLAUGTO	Clúster Automotriz de Guanajuato
CLAUT	Clúster Automotriz de Nuevo León
CONALEP	Colegio Nacional de Educación Profesional Técnica
COVID-19	Corona Virus Disease 2019
C/P	Counterpart
GEJA	Grupo de Empresas Japonesas de Aguascalientes A.C.
GTO	Guanajuato
IECA	Instituto Estatal de Capacitación
INEGI	Instituto Nacional de Estadística y Geografía
ISO	International Organization for Standardization
JCC	Joint Coordination Committee
JETRO	Japan External Trade Organization
JICA	Japan International Cooperation Agency
MMVO	Mazda de México Vehicle Operations
OEM	Original Equipment Manufacturer
PDCA	Plan, Do, Check and Action
PDM	Project Design Matrix
PPM	Project Progress Meeting
PYMES	Pequeñas y Medianas Empresas
QC	Quality Control
QCD	Quality, Cost and Delivery
QRO	Querétaro
R/D	Record of Discussion
REDCAM	Red Nacional de Clústeres de la Industria Automotriz
SDES	Secretaría de Desarrollo Económico Sustentable
SE	Secretaría de Economía
SEDEC	Secretaría de Desarrollo Económico
SEDECO	Secretaría de Desarrollo Económico
SEDECyT	Secretaría de Desarrollo Económico, Ciencia y Tecnología
SEDESU	Secretaría de Desarrollo Sustentable
SLP	San Luis Potosí
TLC	Tratado de Libre Comercio
TLCAN	Tratado de Libre Comercio de América del Norte
T-MEC	Tratado entre México, Estados Unidos y Canadá
UPSLP	Universidad Politécnica de San Luis Potosí
USMCA	United States-México-Canada Agreement
UTA	Universidad Tecnológica de Aguascalientes
UTEQ	Universidad Tecnológica de Querétaro
VE	Vehículo Eléctrico

1. Información básica del Proyecto

1.1 Antecedentes y Objetivos del Proyecto

(1) Antecedentes

A partir de la segunda mitad de la década de los '80, México impulsó la política de liberalización de importación y desregularización de las inversiones externas. Desde la entrada en vigencia del Tratado de Libre Comercio de América del Norte (TLCAN) en 1994, México logró convertirse en el foco de inversión extranjera para las industrias, automotriz, electricidad-electrónica, aeronáutica-espacial, etc. Hasta la fecha, el país ha construido la red de Tratados de Libre Comercio (TLC) con 46 países, incluyendo Japón, y continúa creciendo económicamente a través de la expansión de las exportaciones no solo a Norteamérica, sino también a América Latina y a Asia. En lo que concierne a la industria automotriz, en particular, numerosos fabricantes de equipos originales extranjeros se insertaron en el mercado mexicano, y con ellos, los fabricantes de autopartes. Impulsado por la red con el extenso mercado automotriz a través del TLC, y por el entorno comercial en el que los fabricantes que hayan satisfecho las reglas de origen comprando diversas partes en el mercado local, disfrutan de la exoneración parcial de aranceles, México ha logrado aumentar su producción y exportación, tanto es así que el país ha marcado una producción récord de 3.77 millones de unidades (séptimo lugar en el mundo).

En cuanto a los OEMs japoneses, Nissan Mexicana comenzó sus procesos de manufactura en 1966. En 1983 inició la operación de la planta en Aguascalientes, en 2013 la de la segunda planta, llegando a producir 790 mil unidades al año (datos reales de 2016). En 2014, Honda y Mazda construyeron sus plantas en Guanajuato, así también Nissan abrió una tercera planta en 2017. Posteriormente en 2019 Toyota anunció su plan de poner en operación su nueva planta en Guanajuato. De esta manera, los fabricantes automotrices japoneses están expandiendo sus planes de inversión. Dentro de este contexto, numerosos fabricantes de autopartes japoneses (proveedores autopartes Tier-1) han establecido las plantas de producción en México.

Los OEM y los proveedores de autopartes japoneses necesitan ampliar sus canales de adquisición local para mejorar la eficiencia y reducir los costos de producción, lo cual no es fácil por una serie de razones, como por ejemplo, la dificultad de encontrar los proveedores de autopartes mexicanos (Tier-2) con los que pueden iniciar las transacciones, por un lado, y por otro, porque muchos de los proveedores locales no están en capacidad de responder a los requerimientos de las empresas japonesas en términos de calidad, costo y plazo de entrega (QCD, por sus siglas en inglés). Así, las empresas japonesas están adquiriendo una gran parte de las piezas de empresas extranjeras o están importando directamente del exterior. Como consecuencia, la participación de las empresas mexicanas en la adquisición local ha permanecido solo entre 10 y 30 % (estimación). De esta manera, para las empresas japonesas constituye un desafío urgente fortalecer la cadena de

proveeduría local, y para las empresas mexicanas superar las dificultades en aprovechar la potencialidad del desarrollo industrial asociada con la expansión de la industria automotriz.

JICA, a solicitud del gobierno mexicano ha implementado el Proyecto para el Fortalecimiento de la Cadena de Proveeduría del Sector Automotriz en México (2012-2015) en el que los gobiernos de los Estados de Querétaro, Guanajuato y de Nuevo León han asumido el rol de organismos ejecutores, con la finalidad de brindar asistencia a los proveedores de autopartes mexicanos (Tier-2). El Proyecto consistió en impartir capacitación en KAIZEN de QCD, organizar encuentros comerciales con las empresas japonesas, desarrollar la base de datos de los proveedores de autopartes locales, etc. Posteriormente, el gobierno mexicano ha solicitado al gobierno del Japón ampliar la asistencia para fomentar la participación de los proveedores de autopartes mexicanos en la cadena de suministro automotriz, con base en los resultados alcanzados por el Proyecto mencionado.

JICA envió una misión de estudio para la elaboración del plan detallado en dos ocasiones desde noviembre de 2016, llegando a concertar el acuerdo sobre el marco del proyecto de cooperación técnica con el gobierno federal de México, con los gobiernos estatales de Aguascalientes, Guanajuato, Querétaro y San Luis Potosí, así como con las asociaciones de clúster automotriz. Sustentado por dicho acuerdo, se decidió implementar el presente Proyecto.

(2) Objetivos del Proyecto

El Objetivo Superior, Objetivo del Proyecto y los Resultados Esperados son los siguientes.

Cabe recordar que al inicio del Proyecto, ProMéxico constituía uno de los organismos ejecutores mexicanos, el cual fue disuelto en febrero de 2019 bajo el actual gobierno del Presidente Andrés Manuel López Obrador (AMLO) establecido en diciembre de 2018. Así, los actuales organismos ejecutores mexicanos del presente Proyecto son los gobiernos de los cuatro Estados y los clústeres automotrices de los tres Estados (*¹).

De esta manera, también fue excluido ProMéxico de los Resultados Esperados que se indican a continuación

[Objetivo Superior]

La participación de los proveedores de autopartes mexicanos en la cadena de valor se incrementará en los cuatro Estados seleccionados.

* Cuatro Estados seleccionados: Estados de Aguascalientes, Guanajuato, Querétaro y San Luis Potosí.

¹ Guanajuato, Querétaro y San Luis Potosí

[Objetivo del Proyecto]

Los sistemas de apoyo para promover la participación de los proveedores de autopartes mexicanos en la cadena de proveeduría de los automóviles japoneses por los gobiernos estatales (GEs) y los clústeres automotrices (CAs) serán fortalecidos en los cuatro Estados seleccionados.

[Resultados Esperados]

Resultado Esperado 1 : Los cuatro gobiernos estatales (GEs) y los clústeres automotrices (CAs) de los Estados objetivo (*) amplían las actividades para ofrecer a los proveedores de autopartes mexicanos las oportunidades para encuentros comerciales con la cadena de proveeduría de automóviles japoneses. (OEM, Tier-1)

Resultado Esperado 2 : Los cuatro gobiernos estatales (GEs) y los clústeres automotrices (CAs) de los Estados objetivo <u>aumentan su capacidad para promover las actividades</u> de KAIZEN de los proveedores de autopartes mexicanos.

Resultado Esperado 3 : Se fortalecen los sistemas de capacitación de los gobiernos estatales (GEs) y de los clústeres automotrices (CAs) para los proveedores de autopartes mexicanos en los cuatro Estados objetivo.

Resultado Esperado 4 : Se mejoran las medidas y programas (<u>Plan Maestro</u>) para promover el desarrollo de los proveedores de autopartes mexicanos en los cuatro estados seleccionados.

* Estados de Guanajuato, Querétaro y San Luis Potosí.

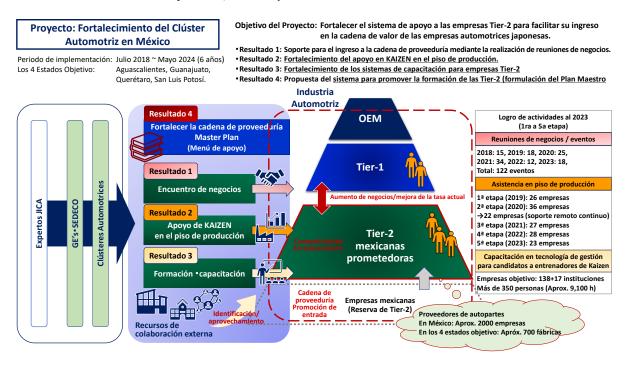


Figura-1: Descripción general del Proyecto Fortalecimiento del Clúster Automotriz

1.2 Período y el Área del Proyecto

(1) Antecedentes

El Proyecto se implementó durante 6 años y 10 meses a partir de junio de 2018 hasta marzo de 2024. Debido a la propagación de COVID-19, el período del Proyecto se extendió de los cinco años originales. El período del Proyecto se dividió en dos fases, la primera mitad y la segunda mitad para ejecutar actividades conforme a la división mostrada en la siguiente tabla, considerando como eje importante las "actividades de apoyo en Kaizen en el piso de producción de las empesas Tier-2", correspondiente al Resultado Esperado 2.

Tabla-1: División de las fases del Proyecto y de las actividades de asistencia a KAIZEN en el piso de producción (etapas)

	Primer período del Proyecto										Seg	gundo	perío	do del	Proye	ecto							
	2018			20	19			20	20		2021		2021			20	22			202	23		2024
T2	T3	T4	T1	T2	T3	T4	T1	T2	T3	T4	T1	T2	T3	T4	T1	T2	T3	T4	T1	T2	T3	T4	T1
			+			1	+			*			,	┛	*			1	4			+	
			`	1ª e	tapa	_	`	2ª et	apa					3ª eta	pa	4 ^a	etapa	-	`	5ª et	apa		
						A				•				A				A				\blacktriangle	

▲: Presentación de los Resultados

(2) Área del Proyecto

Todo el territorio mexicano, principalmente los Estados de Aguascalientes, Guanajuato, Querétaro y San Luis Potosí (cuatro Estados cooperantes).

1.3 Estructura de implementación del Proyecto

(1) Organismo ejecutor, otros organismos y entidades relevantes de México

<Organismo ejecutor mexicano>

Gobiernos de los cuatro Estados, Asociaciones de clúster automotriz de tres Estados.

<Otros organismos y entidades relevantes de México>

Agencia Mexicana de Cooperación Internacional para el Desarrollo (AMEXCID)

(2) Comité de Coordinación Conjunta (JCC: Joint Coordination Committee)

Los planes elaborados en el presente Proyecto deberán ser aprobados por dicho Comité. Los cambios de los mismos también deberán ser acordados en éste. Sus funciones son las mismas establecidas en el R/D. A continuación, se presenta la lista de los miembros de JCC.

(México)

- Director del Proyecto y Gerente del Proyecto
- AMEXCID

(Japón)

- Director General de JICA en México.
- Equipo de expertos de JICA.
- Otros actores relevantes.

(3) Sistema de implementación del Proyecto

Los miembros de C/P de la parte mexicana están conformados del personal de las siguientes organizaciones para implementar el Proyecto junto con los expertos japoneses.

- 1) Agencia Mexicana de Cooperación Internacional para el Desarrollo (AMEXCID)
- 2) Gobierno del Estado de Aguascalientes
- 3) Gobierno del Estado de Guanajuato
- 4) Gobierno del Estado de Querétaro
- 5) Gobierno del Estado de San Luis Potosí
- 6) Clúster Automotriz de Guanajuato
- 7) Clúster Automotriz de Querétaro
- 8) Clúster Automotriz de San Luis Potosí

Tabla-2: Estructura de implementación del Proyecto de la parte mexicana

B . 1 1	D' 11D	
Estado de	Director del Proyecto	Subsecretario de Inversión y Desarrollo
Aguascalientes	Gerente del Proyecto	Director General de Desarrollo Industrial
	Personal Designado	Jefe de Departamento de Fomento a la Industria
Estado de	Director del Proyecto	Subsecretario para el Desarrollo de la Micro, Pequeña y Mediana Empresa
Guanajuato	Gerente del Proyecto	Director General del Clúster Automotriz
	Personal Designado	Jefe de Atención a la Cadena Productiva Automotriz y Componentes
		Coordinadora del Comité de Excelencia Operativa y Academia
Estado de	Director del Proyecto	Subsecretario de Desarrollo Económico
Querétaro	Gerente del Proyecto	Director General del Clúster Automotriz
	Personal Designado	Director de Desarrollo Empresarial
		Coordinador del Comité TR2 del Clúster Automotriz
Estado de San	Director del Proyecto	Directora General de Desarrollo y Promoción Industrial
Luis Potosí	Gerente del Proyecto	Director General del Clúster Automotriz
	Personal Designado	Promotora de Desarrollo y Promoción Industrial
		Coordinadora de Comités del Clúster Automotriz

Tabla-3: Lista del personal de contraparte (C/P) (al fin de febrero de 2024)

Lugar	Organismo	Cargo	Título	Nombre	Apellidos	Cargo en el Proyecto	Participación en curso en Japón / Retiro del cargo
Aguascalientes	Secretaría de	Secretario	Lic.	Esau	Garza de Vega		
	Desarrollo		Lic.	Manuel Alejandro	González Martínez		(Retiro: 31 de enero 2024)
	Económico,		C.P. y L.D.	Luis Ricardo	Martínez Castañeda		Febrero-marzo 2019
	Ciencia y						(Retiro: 31 de diciembre 2019)
	Tecnología	Subsecretario de Inversión y	Lic.	Jorge	Andrade Serafin	Project Director	
	(SEDECyT)	Desarrollo	Lic.	Israel Tagosam	Salazar Imamura	Project Director	(Retiro: 31 de enero 2024)
			Mtro.	Eduardo Alberto	Infante Priego	Project Director	Febrero-marzo 2019 (Retiro: 30 de septiembre de 2022)
		Director General de Desarrollo Industrial	Lic.	Luis David	Mendoza Esparza	Project Manager and Assigned personnel	
			Ing.	Angelo	Vaghi Martínez	Project Manager and Assigned personnel	(Retiro: 30 de septiembre de 2022)
			Ing.	David	Cisneros Castro	Project Manager and Assigned personnel	(Retiro: 15 de mayo 2021)
			T.S.U	Adolfo	Martínez Imperial	Project Manager	(Retiro: 30 de enero 2020)
		Atención a la Industria Local	Mtro.	J. Rommel	Rodríguez Escobar	Assigned personnel	Abril 2023
							A partir de julio 2020
		Fomento a la Industria	Mtro.	J. Rommel	Rodríguez Escobar	Assigned personnel	(Retiro: 5 de marzo de 2020)
		Desarrollo de Proveedores	Lic.	Miguel Angel	Gallegos Castañeda	Assigned personnel	(Retiro: 1 enero de 2020)
		Auxiliar de Gestión de	Lic.	Juan Francisco	Martínez Barraza	Assigned personnel	Enero – marzo 2020
	G 1	Proyectos	T.	D (+1C - C/		(Retiro: julio 2021)
Guanajuato	Secretaría de Desarrollo	Secretario	Lic.	Ramón	Alfaro Gómez		(D; M. 2022)
	Económico	C.1	Lic.	Mauricio	Usabiaga Díaz Barriga	D . (D.)	(Retiro: Mayo 2022)
	Sustentable	Subsecretario para el Desarrollo	Ing.	Joel Froylan	Salas Navarro	Project Director	Julio 2013
	(SDES)	de Micro, Pequeña y Mediana Empresa					
	(SDES)	Directora de la Cadena	Lic.	Verónica	Pérez Ruenes	Assigned personnel	Febrero-marzo de 2019
		Productiva Automotriz y	110.	voronica	1 CLOZ IXUOIIOS	1 tooigned personner	Marzo 2014
		Componentes					(Retiro: 15 de octubre de 2022)
		Jefe de la Cadena Automotriz	Ing.	Jorge	Romero Valdez	Assigned personnel	Julio 2013
		y Componentes					

Lugar	Organismo	Cargo	Título	Nombre	Apellidos	Cargo en el Proyecto	Participación en curso en Japón / Retiro del cargo
	Clúster	Director General	Lic.	Alfredo	Arzola López	Project Manager	Julio 2013
	Automotriz de Guanajuato	Gerente de Operaciones	Mtro.	José Manuel	Vargas Jiménez	Assigned personnel	A partir de enero 2022 Marzo 2023
	(CLAUGTO)	Coordinador de Comité de Compras y Desarrollo de Proveedores	Mtro.	José Manuel	Vargas Jiménez	Assigned personnel	
		Coordinadora del Comité de Excelencia Operativa y Academia	Ing.,	Fátima	Quiroz	Assigned personnel	A partir de febrero 2023
		Coordinadora del Comité de Excelencia Operativa	Ing.	Miriam	Galván Torres	Assigned personnel	(Retiro: 30 de junio de 2022)
		Auxiliar de Comité de Capital Humano	Ing.	Ana Luisa	Valles Cadena		Febrero-marzo 2019 (Retiro: 15 de abril de 2019)
		Coordinadora, Seguridad Patrimonial	Lic.	Esmeralda	Quiroz		Julio 2013
Querétaro	Secretaría de	Secretario	Mtro.	Marco Antonio	Del Prete Tercero		
	Desarrollo	Sub Secretario	Mtro.	Genaro	Montes Díaz	Project Director	
	Sustentable		Lic.	José Antonio	Pérez Cabrera	Project Director	(Retiro: 30 de septiembre de 2021)
	(SEDESU)	Desarrollo Empresarial	Lic.	Mauricio	Cárdenas Palacios	Assigned personnel	
			Lic.	Germán	Borja Garduño	Assigned personnel	Febrero-marzo 2019 (Retiro: 30 de septiembre de 2021)
		Jefe de Departamento	Lic.	Arturo	Guerrero Gómez	Assigned personnel	
			Ing.	José Benjamín	Aguillón Padilla	Assigned personnel	Febrero-marzo 2019 (Retiro: 14 de enero de 2022)
	Clúster Automotriz de Querétaro	Director General	Ing.	Daniel	Hernández Camacho	Project Manager	Febrero-marzo 2019 Agosto 2013 Noviembre 2011
		Gerente General	Lic.	Nelly	Tenorio Aguilar		A partir del 3 de enero de 2022
		Coordinadora de Comités	Lic.	Nelly	Tenorio Aguilar	Assigned personnel	Marzo 2014 (Retiro: 31 de diciembre de 2018)
		Coordinador de Comités	Ing.	David	Romero Saavedra		Abril 2023
		(Desarrollo de Proveedores)	Ing.	Salvador	Flores	Assigned personnel	(Retiro: 6 de mayo de 2022)
			Lic.	Estrella	Escorcia Durán	Assigned personnel	(Retiro:diciembre 2021)

Lugar	Organismo	Cargo	Título	Nombre	Apellidos	Cargo en el Proyecto	Participación en curso en Japón / Retiro del cargo
San Luis Potosí	Secretaría de	Secretario	Lic.	Juan Carlos	Valladares Eichelmann		
	Desarrollo		Dr.	José Arturo	Segoviano García		(Retiro: 15 de febrero de 2022)
	Económico		Mtro.	Gustavo	Puente Orozco		(Retiro: 25 de septiembre de 2021)
	(SEDECO)	Director General de	Lic.	Mónica	Barragán Flores	Project Director	
		Promoción Industrial	Ing.	Jorge	Viramontes Aldana	Project Director	Febrero-marzo 2019
							(Retiro: 25 de septiembre de 2021)
		Administración de proyectos	Lic.	Adela	Reynoso Mercado	Assigned personnel	A partir del 27 de septiembre de
		e inversiones					2021
		Promotora Industrial	Lic.	Adela	Reynoso Mercado	Assigned personnel	Febrero-Marzo 2019
	Clúster	Director General	Ing.	Luis Alberto	González Olvera	Project Manager	Marzo 2023
	Automotriz de		Ing.	Guillermo	Veraza García	Project Manager	(Retiro: 30 de abril de 2021)
	San Luis			Alejandro			
	Potosí		Ing.	Héctor Enrique	Soto Aduna	Project Manager	Febrero-marzo 2019
	(CASLP)						(Retiro: Septiembre de 2019)
		Coordinadora Administrativa	Lic.	Cristina	Roaro Laguna	Assigned personnel	
			Lic.	Mónica	Barragán	Assigned personnel	Enero-marzo 2018
							(Retiro: 30 de agosto de 2021)
		Coordinador de Comités	Lic.	José Antonio	Altés Martínez		(Retiro: Febrero de 2020)
Ciudad de México	Agencia	Subdirector de Cooperación	Lic.	Efraín	Del Ángel Ramírez		
	Mexicana de	con Asia-Pacífico					
	Cooperación	Jefa de Departamento de	Lic.	Lorena	García Nava		(Retiro: Octubre 2020)
	(AMEXCID)	Cooperación con Asia-Pacífico					

A continuación se muestra la estructura de implementación del Proyecto del equipo de expertos de JICA.

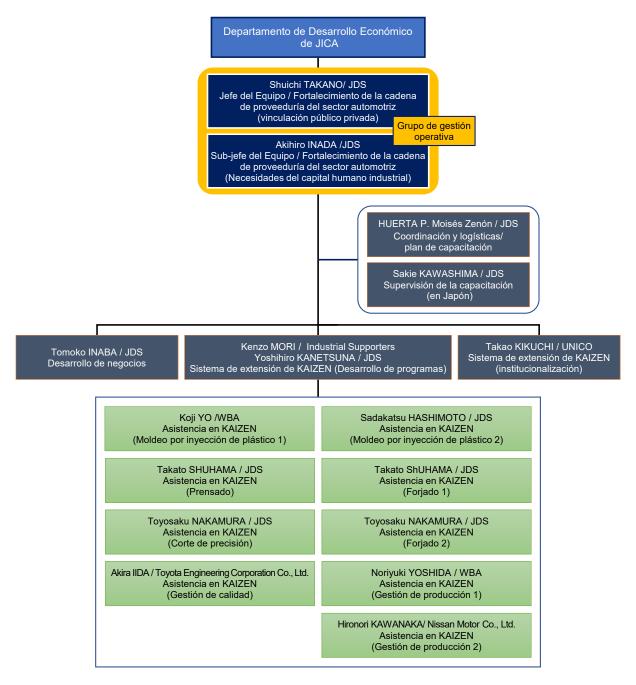


Figura-2: Estructura de implementación del Proyecto del equipo de expertos de JICA

2. Aportaciones realizadas

2.1 Aportaciones de la parte japonesa

(1) Asignación de expertos japoneses

Un experto de largo plazo fue asignado como Asesor Principal desde el inicio del Proyecto (13M/M en total). Además, un total de 15 expertos de corto plazo fue enviado desde el inicio hasta el final del Proyecto (171.14 M/M). Sin embargo, después de su regreso anticipado en junio de 2019, el experto de largo plazo no fue asignado, y en su lugar, a partir de enero de 2020, los expertos de corto plazo fueron quienes continuaron con los deberes y funciones de trabajos administrativos generales.

(2) Capacitación en Japón del personal relacionado con el Proyecto

Como una parte de las aportaciones de la parte japonesa, se llevaron a cabo las 4 capacitaciones en Japón. Unas capacitaciones en Japón fueron orientadas para el personal de los gobiernos estatales y de los CAs, y otras fueron para los candidatos de entrenadores de Kaizen que se encontraban dentro del personal de las empresas y de otros recursos externos, y al final un total de 53 personas mexicanas relacionadas con el Proyecto pudieron participar en las capacitaciones en Japón.

(3) Gastos de operación en el extranjero

Desde el inicio hasta el final del Proyecto en febrero de 2024, durante este tiempo la parte japonesa aportó un total de 113 millones de yenes (unos 13 millones de MXN) para efectuar actividades en México por los expertos de corto plazo, otros 8.25 millones de yenes (unos 1 millones de MXN) para las actividades realizadas en México por los expertos de largo plazo, y 14 millones de yenes (unos 1.7 millones de MXN) para las capacitaciones en Japón (excluidos los gastos de boletos de avión, etc.).

2.2 Aportaciones de la parte mexicana

(1) Asignación del personal mexicano de contraparte (C/P)

En cada estado participante del Proyecto fueron asignados un Director de Proyecto, un Gerente de Proyecto y un Encargado Administrativo, en total 12 contrapartes mexicanos fueron asignados como contrapartes. Estas personas fueron seleccionadas de las oficinas de las Secretarías de Desarrollo Económico de los 4 estados y de las oficinas de los clústeres automotrices de los 3 estados. Con respecto a los entrenadores de Kaizen, formados a través de las actividades del Proyecto, son 47 en total en 4 estados (31 entrenadores pertenecientes a las empresas y 16 de recursos externos).

(2) Instalaciones

La parte mexicana, al inicio del Proyecto, ofreció un espacio como oficina dentro de la Universidad Tecnológica de Querétaro (UTEQ) para las actividades del Proyecto, la cual fue aprovechada para

actividades de oficina del experto de largo plazo, Asesor Principal, pero una vez que se ausentó el Asesor Principal, ya no se encontraba la necesidad de esta oficina durante un largo tiempo, debido a que las actividades de los expertos de corto plazo en los 4 estados volvieron a tener más importancia.

(3) Gastos corrientes (gastos locales)

La parte mexicana cubrió los gastos necesarios para llevar a cabo las actividades del Proyecto de los contrapartes y gastos para realizar capacitaciones y reuniones de encuentros comerciales entre otros. El presupuesto de la Secretaría de Desarrollo Económico de cada estado proviene principalmente del presupuesto de los gobiernos federal y estatal. Sin embargo, el subsidio que daba la Secretaría de Desarrollo Económico a los CAs fue suspendido después de la pandemia de COVID-19, por lo tanto, actualmente la fuente principal de ingresos de los CAs son las cuotas que pagan las empresas miembros de CAs y las cuotas de las capacitaciones que ellos organizan.

3. Grado de logro del Proyecto

3.1 Grado de logro de los resultados (outputs)

A continuación se muestran los logros que se han tenido en los 4 Resultados Esperados (Outputs) a la fecha de febrero de 2024.

Resultado 1: Los SG y CA de los estados objetivo amplían sus actividades para brindar a los proveedores mexicanos de autopartes oportunidades de vinculación comercial con la cadena de proveeduría automotriz japonesa.

Indicador	Resultado
Indicador 1-1: Los SGs y CAs identifican proveedores mexicanos de autopartes que tienen potencial para ingresar a la cadena de proveeduría automotriz japonesa y realizan más de 4 estudios sobre las necesidades de los OEM japoneses y de proveedores automotrices de Tier-1 para adquisiciones locales de manera regular.	[Alcanzado] Desde 2018 hasta la fecha se realizaron 5 estudios sobre las necesidades de adquisición local. En 2024 los gobiernos estatales y los CAs siguen explotando proveedores potenciales.
Indicador 1-2: Los GAs y CAs organizan eventos de encuentro comercial más de cuatro veces al año.	[Alcanzado] A pesar de haber existido un período de prohibición de tener reuniones para evitar la concentración de personas debido al COVID-19, desde 2018 hasta la fecha se organizaron un total de 120 eventos de encuentros comerciales.
Indicador 1-3: Más del 75 % de OEM japoneses, Tier-1 y proveedores mexicanos de autopartes que utilizaron el servicio de vinculación comercial proporcionado por los SGs y CAs consideran que el servicio es satisfactorio.	[Alcanzado] En el estado de GTO tuvo una alta tasa de satisfacción empresarial del 95% en 2022 y 2023. En los otros estados, el número de proveedores y compradores ha sido creciente en proporción al interés de las empresas, excepción durante la pandemia de COVID 19, mostrando crecimientos de más de 200% con respecto a eventos realizados en años anteriores.

Resultado 2: Los GAs y CAs de los estados objetivo mejoran su capacidad para promover las actividades de KAIZEN de los Proveedores Mexicanos de Autopartes.

Indicador	Resultado
Indicador 2-1:	[Alcanzado]
Más del 75 % de las empresas capacitadas logran sus	Mas de 90 % promedio de las empresas participantes
objetivos en materia de Calidad, Costo y Entrega	han logrado sus temas de QCD en el piso de producción
(QCD).	de las empresas.
Indicador 2-2:	[Alcanzado]
En los estados objetivo se desarrollan más de 60	Se formaron <u>más de 100 candidatos de</u>
recursos humanos locales que pueden brindar	entrenadores de Kaizen (capital humano capaz de
orientación técnica a Proveedores Mexicanos de	asesorar Kaizen) de 126 empresas participantes a
Autopartes.	través de las Actividades de Kaizen durante 5 años.
Indicador 2-3:	[Alcanzado]
Más del 75% de los Proveedores Mexicanos de	Los resultados de la encuesta de satisfacción de las
Autopartes que recibieron asistencia técnica por	empresas mostraron que el 98% de las empresas
parte de los entrenadores capacitados están	participantes que recibieron asitencia técnica
satisfechos con su asistencia (Más de 3.5 de cada	estaban altamente satisfechas.
cinco (5) - calificación de evaluación).	
Indicador 2-4:	[Alcanzado]
Más de 40 Entrenadores de Kaizen mexicanos están	Un total de <u>47 entrenadores de Kaizen</u> fueron
formado en los estados objetivo.	formados en los 4 estados objeto del Proyecto.

Resultado 3: Se fortalecen los sistemas de capacitación de SGs y CAs para los Proveedores Mexicanos de Autopartes en los estados objetivo.

Indicador	Resultado
Indicador 3-1:	[Alcanzado]
Las capacitaciones de corto tiempo y los talleres	Capacitación de corto tiempo realizada (<u>63</u>
abiertos se llevan a cabo más de 15 veces al año.	<u>capacitaciones en total</u>)
	• 5 días x 3 estados (2019)
	• 5 días x 4 estados (2020)
	· 3 días x 4 estados (2022)
	· 3 días x 4 estados (2023)
	Capacitación bajo demanda realizada (40 módulos x
	2 = 80 veces
	· 2021 y 2022 (3er y 4a etapa)
	· 2023 (5a etapa)
	Los siguientes capacitación realizada
	· 3 días de capacitación de inyección de plásticos
	@Nissei México (2023/11/21-23)
	· 1 visita de estudio a MAZDA (MMVO) (2023/12/7)
Indicador 3-2:	[Alcanzado]
200 Proveedores Mexicanos de Autopartes	Más de 300 personas recibieron capacitación
participan en capacitaciones.	intensiva
	Más de 240 personas recibieron capacitación "on-
	Más de 42 personas recibieron capacitación en Japon en 2019 y 2023.
Indicador 3-3:	· · · · · · · · · · · · · · · · · · ·
Más del 75% de los Proveedores Mexicanos de	[Alcanzado] FI 90% (240 participantes) do 243 participantes
	El 99% (240 participantes) de 243 participantes
Autopartes que participan en capacitaciones de corto tiempo/talleres abiertos obtienen satisfacción (Más de	en un total de 25 empresas en las capacitaciones sobre demanda y las de corto tiempo valoraron alto
3.5 de cada cinco (5) calificaciones de evaluación).	las capacitaciones realizadas.
5.5 de cada cinco (5) cannicaciones de evaluación).	ias capacitaciones realizadas.

Resultado 4: Se mejoran medidas y programas (Plan Maestro) para impulsar el desarrollo de Proveedores Mexicanos de Autopartes en los estados objetivo.

Indicador	Resultados
Indicador 4-1:	[Alcanzado]
40 recursos potenciales mexicanos están listados por	47 entrenadores de Kaizen están en la lista como
SGs y CAs.	recursos humanos mexicanos, capaces de colaborar.
Indicador 4-2:	[Alcanzado]
Se desarrollan medidas y programas (Plan Maestro)	El gobierno estatal y el clúster automotriz
para fortalecer la cadena de proveeduría en el sector	desarrollaron el programa de fortalecimiento de la
automotriz.	cadena de proveeduría en los 4 estados participantes.

3.2 Grado de logro de objetivo del Proyecto

Objetivo del Proyecto: Se fortalecen los sistemas de apoyo para promover la participación de Proveedores Mexicanos de Autopartes en la cadena de proveeduría automotriz japonesa por parte de los Gobiernos Estatales (SGs) y los Clústeres Automotrices (CAs) en los estados objetivo.

Indicador	Resultado
Indicador 1:	[Parcialmente incumplida]
Se autoriza un sistema de apoyo para la implementación del Plan Maestro entre los gobiernos de los estados objetivo y las asociaciones del clúster automotriz (Personal, presupuesto, plan, resultados)	En el estado de AGS, se ha aprobado el sistema de apoyo y se han aprobado todos los aspectos relacionados con el personal, el presupuesto y la planificación como programa estatal de desarrollo económico. En los estados de QRO y SLP, los planes se han publicado sobre la base de personal capacitado, y se han tomado medidas para garantizar los presupuestos a través de un sistema de presupuestación independiente, es decir, mediante el pago por servicios con las Asociaciones del Clúster Automotriz como organismos principales. En el Estado de Guanajuato consideran que el proceso no debe detenerse por factores externos como la veda electoral. La visión es mantener los procesos constantes integrando a más talento humano del IECA y otras instituciones educativas.
Indicador 2: Más de 40 empresas utilizan/usan el sistema de apoyo en todos los estados.	[Alcanzado] En los 4 estados participantes del Proyecto un total de 138 empresas aprovecharon el sistema de soporte (capacitación y asistencia en Kaizen en el piso de producción).
Indicador 3: Más del 40% de las empresas que utilizan el sistema de apoyo desean seguir utilizándolo (= efectividad del sistema de apoyo)	[Alcanzado] · 17 empresas (65%) continúan (1B→2B) · 12 empresas (54%) continúan (2B→3B&4B) · 14 empresas (25%) continúan (3B&4B→5B) Los resultados de la encuesta de satisfacción de las empresas mostraron que el 100% de 24 empresas que recibieron asistencia técnica en la quinta etapa (número de respuestas: 62 personas / 24 empresas) deseaban seguir participando (el 79% lo deseaba fervientemente: 49 personas / 24 empresas y el 19% deseaba participar: 13 personas / 8 empresas).

Indicador	Resultado
Indicador 4:	[Alcanzado]
Más de 12 de los Proveedores Mexicanos de	Dentro de las empresas que han recibido asesoría
Autopartes beneficiarios mantienen o se hacen	técnica, 10 empresas suscribieron por primera vez al
miembros de CAs de los estados objetivo o entidades	clúster automotriz, consecuentemente ahora 24
similares.	empresas están suscritas en los CAs.
Indicador 5:	[Alcanzado]
La competitividad de los Proveedores Mexicanos de	El resultado del estudio de impactos muestra que <u>50</u>
Autopartes se incrementa mediante la aplicación del	empresas (51 respuestas válidas, 98%) que han
sistema de apoyo.	utilizado el sistema de soporte (capacitación y
	asesoría de Kaizen en piso de producción)
	aumentaron su competitividad.

4. Historia de modificación del PDM

El PDM ha sido modificado conforme a la situación real de las actividades del Proyecto. A continuación se muestran las partes modificadas y sus razones.

- En la 1ra reunión de avance del Proyecto (Project Progress Meeting: PPM) del 30 de noviembre de 2018, se modificó la Versión 0 por la Versión 1, cambiando el plazo del Proyecto y algunos términos. (Tabla-4)
- En el 1er JCC del 28 de junio de 2019, se modificó la Versión 1 por la Versión 2, cambiando y/o eliminando las partes correspondientes debido a la disolución de ProMéxico, que era uno de los órganos ejecutores del Proyecto (Tabla-5)
- En el 2do JCC del 6 de febrero de 2020 se acordó la calendarización de modificación de la Versión 2 a la Versión 3, y después de tener reuniones en línea, el 5 de febrero de 2021 (4 de febrero, fecha de México) se acordó la Versión 3, dando mayor precisión en algunos términos, modificando unos indicadores más apropiados con las actividades y ordenando los contenidos de actividades. (Tabla-6)
- En el 3er JCC del 9 de noviembre de 2021, se modificó la Versión 3 por la Versión 3.1, definiendo los indicadores que no estaban definidos todavía. (Véase PDM adjunto)
- En el 4to JCC del 9 de noviembre de 2022 se acordó la extensión del período del Proyecto de junio de 2023 a marzo de 2024 por las afectaciones de propagación del COVID-19.

Tabla-4: Cambios de la PDM (Versión1)

Cambios	Antes del cambio	Después de revisión	Justificación
Project	Year 2017 -2022 (5 years)	4th June, 2018 – 3rd June,	Se incorporó la fecha de
Period		2023 (5 Years)	inicio de trabajo del experto
			de JICA de largo plazo.
Actividades	Tier-2 KAIZEN Driving	Tier2 KAIZEN Activity	Con el fin de evitar confusión
	competitiveness project		entre las actividades del
			Proyecto con el Proyecto
			correspondiente
Inputs	Training in Japan	Knowledge Co-Creation	Cambio del título oficial de la
	Japanese Business Practice,	Program (Training in Japan	capacitación en Japón Las
	Production Management,	and the third country)	áreas a cubrir serán definidas
	Production Technology,		en el curso del Proyecto
	Automotive Industrial policy		
	and Capacity Development		

Tabla-5: Cambios de la PDM (Versión 2)

Item	Before modification	After modification
Implementing Agency	4 State Governments, 3 Automotive Clusters in the Target States and ProMéxico	4 State Governments, 3 Automotive Clusters in the Target States-and- ProMéxico
Output 1 (Narrative Summary)	SGs and ACs of target states and ProMéxico expand activities to provide Mexican Auto Parts Suppliers with the opportunities for business matching with the value chain of Japanese Automobile.	SGs and ACs of target states and ProMéxico expand activities to provide Mexican Auto Parts Suppliers with the opportunities for business matching with the value chain of Japanese Automobile.
Output 1 (Objectively Verifiable Indicators)	 1-1. SGs, ACs and ProMéxico identify Mexican Auto Parts Suppliers that have a potential to come into the value chain of Japanese Automobile and conduct the survey on the needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement on a regular basis. 1-2. SGs, ACs and ProMéxico organize events for business matching more than XX times a year. 1-3. XX % of Japanese OEM, Tier-1 and Mexican Tier-2 Auto Parts Suppliers that utilized the business matching service provided 	 1-1. SGs, ACs and ProMéxico ACs identify Mexican Auto Parts Suppliers that have a potential to come into the value chain of Japanese Automobile and conduct the survey on the needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement on a regular basis. 1-2. SGs, ACs and ProMéxico ACs organize events for business matching more than XX times a year. 1-3. XX % of Japanese OEM, Tier-1 and Mexican Tier-2 Auto Parts Suppliers that utilized the business matching service provided
Output 1	by SGs, ACs and ProMéxico find the service to be satisfactory. Interview survey to SGs, ACs of the target states and ProMéxico	by SGs , and ACs and ProMéxico find the service to be satisfactory. Interview survey to SGs, ACs of the target states and ProMéxico
(Means of Verification) Output 1 (Objectively Verifiable Indicators)	4-2. Each target State and ProMéxico prepare at least one program or measure to promote the development of Mexican Tier-2 Auto Parts Suppliers.	4-2. Each target State-and ProMéxico prepare at least one program or measure to promote the development of Mexican Tier-2 Auto Parts Suppliers.
Output 1 (Means of Verification)	Interview survey to each target State and ProMéxico	Interview survey to each target State and ProMéxico
Activities (1-2, 1-3, 1-4, 1-6, 1-7, 1-8)	 1-1. SGs and ACs conduct the survey on the needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement. 1-2. SGs, ACs and ProMéxico select Mexican Auto Parts Suppliers that have a potential to come into the value chain of Japanese Automobile. 	 1-1. SGs and ACs conduct the survey on the needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement. 1-2. SGs, ACs and ProMéxico-ACs select Mexican Auto Parts Suppliers that have a potential to come into the value chain of Japanese Automobile.
	 1-3. SGs, ACs and ProMéxico make business matching of target Mexican Tier-2 Auto Parts Suppliers with Japanese OEM and Tier-1 Automotive Suppliers according to their needs. 1-4. SGs, ACs and ProMéxico organize factory tours to Mexican Tier-2 Auto Parts Suppliers targeted for Japanese OEM and Tier-1 Automotive Suppliers. 	 1-3. SGs, ACs and ProMéxico-ACs make business matching of target Mexican Tier-2 Auto Parts Suppliers with Japanese OEM and Tier-1 Automotive Suppliers according to their needs. 1-4. SGs, ACs and ProMéxico-ACs organize factory tours to Mexican Tier-2 Auto Parts Suppliers targeted for Japanese OEM and Tier-1 Automotive Suppliers.

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Item	Before modification	After modification
	1-6. SGs, ACs and ProMéxico update the Automotive Supplier	1-6. SGs, ACs and ProMéxico ACs update the Automotive Supplier
	Database reflecting the latest information of Mexican Tier-2	Database reflecting the latest information of Mexican Tier-2
	Auto Parts Suppliers.	Auto Parts Suppliers.
	1-7. SG, ACs and ProMéxico provide the information about Mexican	1-7. SG, ACsSGs and ProMéxico ACs provide the information about
	Tier-2 Auto Parts Suppliers that have a potential to come into the	Mexican Tier-2 Auto Parts Suppliers that have a potential to come
	Value chain of Japanese Automobile with Japanese OEM and	into the Value chain of Japanese Automobile with Japanese OEM
	Tier-1 Automotive Suppliers on a regular basis.	and Tier-1 Automotive Suppliers on a regular basis.
	1-8. SGs, ACs and ProMéxico organize expositions and business	1-8. SGs, ACs and ProMéxico ACs organize expositions and
	matching events promoting the participation of Japanese OEM	business matching events promoting the participation of
Activities	and Tier-1 Automotive Suppliers.	Japanese OEM and Tier-1 Automotive Suppliers.
(4-1, 4-2, 4-3, 4-4, 4-5)	4-1. SGs, ACs and ProMéxico plan to organize "the Automotive Value chain Discussion Meeting", through which Japanese	4-1. SGs, ACs and ProMéxico ACs plan to organize "the Automotive Value chain Discussion Meeting", through which Japanese
(4-1, 4-2, 4-3, 4-4, 4-3)	OEM, Tier-1 Automotive Suppliers and Mexican Tier-2 Auto	OEM, Tier-1 Automotive Suppliers and Mexican Tier-2 Auto
	Parts Suppliers see each other and have an open dialogue.	Parts Suppliers see each other and have an open dialogue.
	4-2. SGs, ACs and ProMéxico organize "the Automotive Value chain	4-2. SGs , ACs and ProMéxico ACs organize "the Automotive Value chain
	Discussion Meeting" with participation of Japanese OEM, Tier-1	Discussion Meeting" with participation of Japanese OEM, Tier-1
	Automotive Suppliers and Mexican Tier-2 Auto Parts Suppliers	Automotive Suppliers and Mexican Tier-2 Auto Parts Suppliers on a
	on a regular basis, and identify necessary measures to support	regular basis, and identify necessary measures to support business
	business development of Mexican Tier-2 Auto Parts Suppliers.	development of Mexican Tier-2 Auto Parts Suppliers.
	4-3. SGs, ACs and ProMéxico review the project activities and	4-3. SGs, ACs and ProMéxico ACs review the project activities and
	identify policies and measures to support business development	identify policies and measures to support business development
	of Mexican Tier-2 Auto Parts Suppliers.	of Mexican Tier-2 Auto Parts Suppliers.
	4-4. SGs, ACs and ProMéxico draft the support programs and/or	4-4. SGs , ACs and ProMéxico ACs draft the support programs
	measures to promote the development of Mexican Tier-2 Auto	and/or measures to promote the development of Mexican Tier-2
	Parts Suppliers.	Auto Parts Suppliers.
	4-5. SGs, ACs and ProMéxico submit the above mentioned	4-5. SGs , ACs and ProMéxico ACs submit the above mentioned
	measures and programs to the concerned authorities.	measures and programs to the concerned authorities.
Inputs (Mexican side)	(5) ProMéxico	Delete
	(a) Project Director: Executive Directorate of International	
	Business Models	
	(b) Project Manager: Director of International Cooperation	
	(c) Assignment of Personnel:	
	• Executive Directorate for Sector "B" represented by the	
	Director of Auto Parts Industries	
	Coordinator of Global Chain Operation	
	• Director of ProMéxico's Office in Aguascalientes	
	• Director of ProMéxico's Office in Guanajuato	
	• Director of ProMéxico's Office in Queretaro	
	Director of ProMéxico's Office in San Luis Potosi	

Tabla-6: Cambios de la PDM (Versión 3)

Version 2.0 (June 30, 2019)	Version 3.0 (February 2021)	
Overall Goal:		
Participation of Mexican Auto Parts Suppliers in automotive value chain is increased in	n the target states.	
Objectively Verifiable Indicators (OVI) 1: More than XX Mexican Auto Parts	OVI1: More than XX Mexican Auto Parts Suppliers start or expand their business in	
Suppliers start or expand their business related to the automotive value chain in the	the automotive supply chain in the target states.	
target states.	OVIO M. d. WY M. d. D. G. I'.	
OVI2: OEM and Tier-1 Automotive Suppliers in the target states increase the number of local supplier with which they do business and the amount of local	OVI2: More than XX Mexican Auto Parts Suppliers gain a certain level of competitiveness to initiate business negotiations in the automotive supply	
procurement (For example, more than fifty (50) percent of those surveyed	chain in the target states.	
response that they increased them).		
Project Purpose:		
	Tier-2) in the value chain of Japanese Automobile by State governments (SGs) and	
Automotive Clusters (ACs) are strengthened in the target states.		
OVII: More than XX enterprises targeted for business matching and technical	OVI1: A supporting system for implementing the Master Plan is authorized by the	
training provided by the Project start and expand business with Japanese	target states governments and automotive cluster associations (Personnel,	
Tier-1 Automotive Suppliers (including the enterprises which start business	budget, plan, results).	
negotiations with Japanese Tier-1 Automotive Suppliers).		
OVI2: More than XX Japanese Tier-1 Automotive Suppliers in the target states	OVI2: More than XX companies use/utilize the supporting system.	
appreciate the business matching activities and the support to develop		
Mexican Auto Parts Suppliers by SGs and ACs.		
OVI3: Systems of SGs and ACs to continuously provide the business matching	OVI3: XX% of companies using the supporting system, desire to continue using	
service aimed at Japanese Tier-1 Automotive Suppliers and technical	the system (= effectiveness of the supporting system).	
training service to Mexican Auto Parts Suppliers are established.		
OVI4: XX of the beneficiary Mexican Tier 2 Auto Parts Suppliers maintain or	OVI4: XX of the beneficiary Mexican Auto Parts Suppliers maintain or become	
become member of ACs of the target states or similar entities.	members of ACs of the target states or similar entities.	
	OVI5: Competitiveness of Mexican Auto Parts Suppliers is increased by applying	
-	the supporting system. (i.e., evaluation from the buyer's point of view is	
Out-out1.	increased)	
Output1:		
SGs and ACs of target states expand activities to provide Mexican Auto Parts	SGs and ACs of target states expand activities to provide Mexican Auto Parts	
Suppliers with the opportunities for business matching with the value chain of		
Japanese Automobile.	supply chain.	
OVII-1: SGs and ACs identify Mexican Auto Parts Suppliers that have a potential to	No change	
come into the value chain of Japanese Automobile and conduct the survey		
on the needs of Japanese OEM and Tier-1 Automotive Suppliers for local		
procurement on a regular basis.		

OVI1-2: SGs and ACs organize events for business matching more than XX times a year. OVI3: XX % of Japanese OEM, Tier-1 and Mexican Tier 2 Auto Parts Suppliers that utilized the business matching service provided by SGs and ACs find the service to be satisfactory. Output2: SGs and ACs of target states enhance their capacity to develop Mexican Tier-2 Auto Parts Suppliers. OVI2-1: XX % of trained enterprises achieve their target regarding Quality, Cost and Delivery (QCD). OVI2-2: More than XX local human resources who can provide technical guidance to Mexican Tier-2 Auto Parts Suppliers are developed OVI2-3: More than XX % of Mexican Tier-2 Auto Parts Suppliers that received technical guidance from the trained trainers are satisfied with their guidance (More than 3.5 in five (5) -grade evaluation). OVI2-4: More than XX of Mexican Auto Parts Suppliers are strengthened in the target states. OVI3-1: Short-term trainings/open workshops are implemented more than XX times a year. OVI3-2: More than XX Mexican Auto Parts Suppliers participate in short-term trainings/open workshops.	Version 2.0 (June 30, 2019)	Version 3.0 (February 2021)
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OVI3-1: Short-term trainings/open workshops are implemented more than XX times a year. OVI3-2: More than XX Mexican Auto Parts Suppliers participate in short-term trainings/ open workshops. No change		1
a year. OVI3-2: More than XX Mexican Auto Parts Suppliers participate in short-term trainings/ open workshops. No change		
OVI3-2: More than XX Mexican Auto Parts Suppliers participate in short-term trainings/ open workshops.		No change
trainings/ open workshops.		N. 1
		No change
OVICE VV 0/ CM-1 - A-t D-t C-1 - d-t - d-t - d-t - D-t C-1 - d-t -		N1
OVI3-3: XX % of Mexican Auto Parts Suppliers that participate in short-term trainings/ open workshops get satisfaction (More than 3.5 in five (5) -grade		No change
evaluation).		
Output4:	/	
Measures and programs to promote the development of Mexican Tier-2 Auto Parts Measures and programs (Master Plan) to promote the development of Mexican Auto	•	Measures and programs (Master Plan) to promote the development of Mexican Auto
Suppliers are proposed in the target states. Necessaries and programs to promote the development of Mexican Auto Parts Suppliers are improved in the target states.		
OVI4-1: "The Automotive Value chain Discussion Meeting" is implemented at least OVI4-1: XX Mexican potential resources are listed by SGs and ACs.		
XX times.		OV14-1. AX Mexican potential resources are fisted by SGs and Aes.
OVI4-2: Each target State prepare at least one program or measure to promote the OVI4-2: Measures and programs (Master Plan) are developed.		OVI4-2: Measures and programs (Master Plan) are developed
development of Mexican Tier-2 Auto Parts Suppliers.		O VII 2. Medicates and programs (Masser Flam) are developed.
Activities: (changes only)		
1-2. SGs and ACs select Mexican Auto Parts Suppliers that have a potential to come 1-2. SGs and ACs identify Mexican Auto Parts Suppliers that have a potential to	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	1-2. SGs and ACs identify Mexican Auto Parts Suppliers that have a potential to
into the value chain of Japanese Automobile. come into the Japanese Automotive supply chain.		
1-3. SGs and ACs make business matching of target Mexican Tier 2 Auto Parts 1-3. SGs and ACs prepare the plan to make business matching of target Mexican		
Suppliers with Japanese OEM and Tier-1 Automotive Suppliers according to Tier-2 Auto Parts Suppliers with Japanese OEM and Tier-1 Automotive		
their needs. Suppliers according to their needs.		

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1-4. SGs and ACs organize factory tours to Mexican Tier-2 Auto Parts Suppliers targeted for Japanese OEM and Tier-1 Automotive Suppliers	1-4. SGs and ACs organize the exposition and make business matching of Mexican Tier-2 Auto Parts Suppliers targeted for Japanese OEM and Tier-1 Automotive Suppliers.
1-7. SGs and ACs provide the information about Mexican Tier-2 Auto Parts Suppliers that have a potential to come into the Value chain of Japanese Automobile with Japanese OEM and Tier-1 Automotive Suppliers on a regular basis.	1-7. SGs and ACs provide the information about Mexican Tier-2 Auto Parts Suppliers that have a potential to come into the automotive supply chain with Japanese OEM and Tier-1 Automotive Suppliers on a regular basis.
1-8. SGs and ACs organize expositions and business matching events promoting the participation of Japanese OEM and Tier-1 Automotive Suppliers.	Delete
1-9. SGs and ACs summarize the experiences of business matching and share them with other states.	1-8. SGs and ACs summarize the experiences of business matching and share them with other target states.
2-1. SGs and ACs design the system to continuously develop <u>Mexican Tier-2 Auto Parts Suppliers</u> .	2-1. SGs and ACs identify the needs of Japanese OEM and Tier-1 to develop Mexican Auto Parts Suppliers.
2-2. SGs and ACs select enterprises targeted for training among the ones that have a potential to come into the Value chain of Japanese Automobile.	2-2. SGs and ACs select enterprises targeted for training among the ones that have a potential to come into the Japanese automotive supply chain.
2-3. SGs and ACs prepare the plan of "Tier2 KAIZEN Activity *".2-4. SGs and ACs select Mexican trainers.	2-3. SGs and ACs prepare the Implementation plan of "Tier-2 KAIZEN Activity *".2-4. SGs and ACs identify and select "Candidates of Mexican KAIZEN trainers".
2-5. SGs and ACs prepare the plan of Mexican trainer development.	2-4. Sos and ACs identify and select Candidates of Mexican KAIZEN trainers.2-5. SGs and ACs prepare the training plan for "Candidates of Mexican KAIZEN trainers".
2-8. SGs and ACs evaluate the capacity of Mexican trainers and grant recognition as a trainer for Automotive Parts Supplier.	2-8. SGs and ACs evaluate the capacity of "Candidates of Mexican KAIZEN trainers" and register as Mexican KAIZEN trainers.
-	2-9. SGs and ACs organize the seminar to disseminate best practice of KAIZEN Activities of automotive Suppliers.
2-9. SGs and ACs summarize the experiences of activities for "Tier2 KAIZEN Activity" and share them with other states.	2-10. SGs and ACs summarize the experiences of activities for "Tier-2 KAIZEN Activity" and share them with other target states
-	2-11. SGs and ACs develop the model plan to implement Tier-2 KAIZEN Activities.
3-2. SGs and ACs implement the training for 5S and KAIZEN.	3-2. SGs and ACs implement the training for quality management and productivity control (KAIZEN).
3-3. SGs and ACs implement the training for quality improvement and product development.	
3-4. SGs and ACs implement the training for business manners and practices.	3-3. SGs and ACs implement the training for business manners and practices.
3-5. SGs and ACs organize the seminars to disseminate best practices of Mexican Auto Parts Suppliers including the achievements of KAIZEN Group.	3-4. SGs and ACs evaluate the results of implemented training.
3-6. SGs and ACs regularly review the project activities and consider the new issues to be addressed.	3-5. SGs and ACs identify the new issues to be developed in the training plan.
4-1. SGs and ACs plan to organize "the Automotive Value chain Discussion Meeting", through which Japanese OEM, Tier-1 Automotive Suppliers and Mexican Tier-2 Auto Parts Suppliers see each other and have an open dialogue.	4-1. SGs and ACs review their policies and projects to promote the Mexican Auto Parts Suppliers.

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4-2.	SGs and ACs organize "the Automotive Value chain Discussion Meeting"	4-2. SGs and ACs identify the Mexican potential resources to be collaborated.
	with participation of Japanese OEM, Tier-1 Automotive Suppliers and	
	Mexican Tier-2 Auto Parts Suppliers on a regular basis, and identify	
	necessary measures to support business development of Mexican Tier-2	
	Auto Parts Suppliers.	
4-3.	SGs and ACs review the project activities and identify policies and measures to	4-5. SGs and ACs summarize the experiences and share them with the target states.
	support business development of Mexican Tier-2 Auto Parts Suppliers.	
4-4.	SGs and ACs draft the support programs and/or measures to promote the	4-3. SGs and ACs prepare the draft of support programs and/or measures (Master
	development of Mexican Tier-2 Auto Parts Suppliers.	Plan) to promote the development of Mexican Tier-2 Auto Parts Suppliers.
4-5.	SGs and ACs submit the above mentioned measures and programs to the	4-4. SGs and ACs submit above Master Plan to the concerned authorities.
	concerned authorities	

5. Resultados de la revisión conjunta

5.1 Resultados de evaluación final con base en los Criterios de Evaluación del CAD

De acuerdo a los seis criterios de evaluación del CAD, pertinencia, coherencia, efectividad, eficiencia, impacto, y sostenibilidad se calificaron en una escala de cuatro puntos: 4. Extremadamente alto, 3. alto, 2. ligeramente bajo, 1. bajo.

5.1.1 Pertinencia

Se considera una **pertinencia "alta"** del presente Proyecto, debido a su coherencia con la política de desarrollo de México, así como con las necesidades de desarrollo del grupo objetivo.

(1) Coherencia con la política de desarrollo del gobierno mexicano

La administración actual (Presidente López Obrador) habla de la política económica en su Informe Presidencial (2022-2023) en el que se considera como línea importante el "fomento a inversión privada", y para lograrlo se identifican cinco sectores estratégicos clave que son "industria eléctrica y electrónica", "semiconductores", "industria automotriz (electromovilidad)", "dispositivos médicos e industria farmacéutica" y "agroindustria", mencionando como política industrial fortalecer el marco relativo a las cadenas de valor de estas industrias. Por consiguiente, el Proyecto se considera altamente coherente con la política de desarrollo del gobierno mexicano.

(2) Necesidades de Desarrollo del grupo objetivo

Los cuatro Estados seleccionados para este Proyecto, Aguascalientes, Guanajuato, Querétaro y San Luis Potosí, forman bases importantes de la industria automotriz de México. La importancia (presencia) de la industria automotriz mexicana en la región de América del Norte es cada vez más significativa, debido al T-MEC (antiguo TLCAN renegociado) y también por influencia de la relocalización (Nearshoring) de negocios principalmente de los Estados Unidos.

Por otro lado, la cadena de proveeduría en la industria automotriz se está globalizando, y si una empresa no tiene capacidades de MONOZUKURI de nivel mundial, será eliminada. El fortalecimiento de las capacidades de MONOZUKURI para el cual se ha venido trabajando en este Proyecto, combinado con la superioridad en Nearshoring, ayudará a aumentar aún más el significado de la presencia mexicana en la cadena de proveeduría automotriz.

El Estado de Aguascalientes cuenta desde hace tiempo con una base industrial y una aglomeración relacionada con las industrias ferroviarias y automotrices, construyendo cadenas de proveeduría en torno a las plantas de ensamble de vehículos de los OEMs japoneses. En el Estado de Guanajuato, desde hace unos 10 años, algunos OEMs japoneses principales iniciaron la construcción y la operación de sus plantas grandes de ensamble de automóviles, por lo cual ahí, incluyendo en el Estado vecino de Querétaro, se ha desarrollado rápidamente la expansión de los proveedores de

autopartes japoneses. Desde aproximadamente 2022, tras la propagación de COVID-19, ha empeorado significativamente la seguridad pública con diversos problemas presentados, pero la escasez de capital humano calificado sigue existiendo como necesidad de desarrollo en la región. Igualmente, en el Estado de San Luis Potosí también se establece una importante base de producción de autopartes no sólo para México sino también para Estados Unidos, y tanto los OEM europeos y estadounidenses como los proveedores de autopartes japoneses se están expandiendo en esta región.

Además, las instituciones de contraparte (C/P) del Proyecto que son la Secretaría de Desarrollo Económico y el Clúster Automotriz de cada Estado, teniendo como su misión fortalecer la cadena de proveeduría automotriz y fomentar la industria local (fortalecimiento de la competitividad) en los respectivos Estados, han implementado diversas medidas de apoyo, tales como el desarrollo de recursos humanos (capacitación) para empresas y el apoyo a la certificación ISO, etc. Las actividades en el presente Proyecto, como la capacitación y la asistencia en KAIZEN en el piso de producción para el sector automotriz, se han implementado con los contenidos que reflejan directamente las necesidades de las empresas relacionadas con la industria automotriz en la región objetivo, y muchas empresas han participado repetidamente en estas actividades del Proyecto, lo cual puede interpretar que concuerda con las necesidades de la industria de autopartes, que es el beneficiario final del Proyecto.

(3) Idoneidad del tamaño y el alcance de la selección de los beneficiarios

En los cuatro Estados objetivo de este Proyecto, se han confirmado las necesidades de desarrollo arriba descritas, y la inversión ha aumentado desde antes del inicio del Proyecto. En cuanto a las empresas manufactureras de automóviles de nuestro país, Nissan inició la producción en 1966 y la operación de la planta Aguascalientes en 1983, la planta II en 2013 y la planta III en 2017 en el mismo Estado. Asimismo, en 2014 Honda y Mazda construyeron sus nuevas plantas en el Estado de Guanajuato y Toyota inició la operación en la planta de Guanajuato. De esta manera se ha venido incrementando la inversión.

Junto con el crecimiento antes mencionado, han estado llegando cada vez más proveedores japoneses de autopartes (Tier-1), con más de 700 plantas de autopartes concentradas en los cuatro Estados objetivo de la región de El Bajío entre los aproximadamente 2,000 proveedores de autopartes existentes en México.

Además, teniendo en cuenta que existen cadenas de suministro (relaciones comerciales) que trascienden los estados dentro de estos 4 Estados objetivo del Proyecto, puede juzgarse que el tamaño y el alcance de la selección de los beneficiarios fueron adecuados.

Por lo antes mencionado, se puede considerar alta la pertinencia del Proyecto con respecto a las necesidades de desarrollo de las instituciones objetivo de contraparte.

5.1.2 Coherencia

Se considera que el Proyecto tiene una <u>coherencia "alta"</u>, tomando en cuenta la coherencia con la Asistencia Oficial para el Desarrollo (AOD) de Japón y otros proyectos relacionados de JICA.

(1) Coherencia con la política de AOD de Japón

En la "Política de Asistencia para el Desarrollo por País (antes Programas de Asistencia por País) para México" (2021), se establece como política básica (objetivo general) que "se implementará la cooperación para contribuir a la solución de problemas internos asociados al desarrollo social y económico a través de una cooperación que apoya al fortalecimiento de la industria nacional y al combate a la pobreza, así como para contribuir al desarrollo de México y de la región de América Latina a través de una cooperación que apoya a mejorar la conectividad regional". Igualmente, como área prioritaria (objetivo específico) se determina "abordar una promoción industrial integral desde diversos enfoques, incluyendo la vinculación empresarial-académica-gubernamental", y más se establece "apoyo a las PyMEs: brindar apoyo para mejorar las capacidades técnicas y el desarrollo de recursos humanos de las PyMEs que componen la industria de soporte". Esto coincide precisamente con el contenido del presente Proyecto, que establece como uno de los Resultados Esperados la promoción de la formulación de mecanismos de vinculación empresarial-académica-gubernamental entre diversos actores interesados, principalmente de la industria automotriz.

(2) Afinidad con la experiencia y superioridad tecnológica de Japón

Japón es uno de los principales productores y exportadores de automóviles en el mundo y cuenta con una experiencia y know-how de muchos años en términos de políticas y tecnologías de la industria automotriz. Además, JICA ha implementado hasta la fecha varios proyectos de desarrollo del sector privado en México, incluyendo la industria automotriz. En el presente Proyecto también se han utilizado el conocimiento, la experiencia y la red de capital humano adquiridos en anteriores proyectos de cooperación, por lo que se observa una afinidad sumamente alta con la experiencia y la superioridad tecnológica de Japón.

(3) Colaboración con otros proyectos

En el pasado, las Secretarías de Desarrollo Económico de los cuatro Estados arriba mencionados y la Organización de Comercio Exterior de Japón (JETRO, por sus siglas en inglés) han colaborado en diversas actividades para atraer empresas japonesas a México, como los "Seminarios/Encuentros comerciales para apoyar la entrada de proveedores japoneses de autopartes en México". En particular, antes de la pandemia de COVID-19, entre otras muchas colaboraciones, las Secretarías de Desarrollo Económico de los cuatro Estados recibieron conjuntamente la "Misión de estudio local por las empresas japonesas interesadas en expandirse en México" organizada por JETRO e intercambiaron opiniones con la Misión de estudio. Por otra

parte, no se han identificado competencias ni repeticiones con otros donantes en el ámbito de la cooperación internacional.

5.1.3 Efectividad

Con respecto al objetivo del Proyecto, el grado de logro de cada indicador es alto, contribuyendo al logro del objetivo del Proyecto. Sobre la base de todos estos factores, se considera que <u>la efectividad</u> <u>del Proyecto es "alta"</u>.

(1) Relación causa-efecto con los Resultados

Se puede considerar que los Resultados Esperados del Proyecto se han manifestado conforme a lo planeado. Se puede concluir que el objetivo del Proyecto tenían una lógica adecuada para que se cumplieran con la manifestación de los siguientes Resultados: el fortalecimiento de las actividades a nivel estatal para ofrecer oportunidades de encuentros comerciales (Resultado Esperado 1), la mejora de la capacidad para promover las actividades de KAIZEN en los proveedores de autopartes (Resultado Esperado 2), el fortalecimiento de sistemas de capacitación para los proveedores de autopartes (Resultado Esperado 3) y la propuesta de sistemas y programas para promover el desarrollo de los proveedores de autopartes (Resultado Esperado 4).

(2) Perspectiva del logro de los objetivos del proyecto

Aunado al plan de implementación (Master Plan) propuesto por cada Estado, también en el Estado de Guanajuato en donde se esperan elecciones estatales y municipales para este año, se ha confirmado un firme compromiso sobre la continuidad de la ejecución del Master Plan (2024) posterior a la finalización del Proyecto por parte de la Secretaría de Desarrollo Económico Sustentable. En particular, este Estado considera que es fundamental aumentar el número de "Entrenadores de Kaizen" que son núcleo de la promoción del Plan de Implementación", y promete un sistema colaborativo que involucre no sólo al Clúster Automotriz de Guanajuato (Claugto) sino también a los institutos de formación profesional del estado como el Instituto Estatal de Capacitación (IECA) y los planteles de la educación superior tecnológica e industrial (CONALEP) (Indicador 1).

En cuanto a otros indicadores, hemos confirmado el logro de los resultados que superan notablemente las metas. Un total de 138 empresas han utilizado o aprovechado estos sistemas de apoyo (asistencia en Kaizen en el piso de producción y actividades de capacitación), superando con creces el objetivo inicial de 40 empresas (Indicador 2). La tasa media de participación continua de las empresas participantes durante el período superó el 60%, y entre las empresas que participaron en 2023, todas las 35 empresas (100%) quieren seguir utilizando los sistemas, por lo que se puede confirmar que los resultados superaron con creces el objetivo inicial de "seguir participando el 40% o más de empresas" (Indicador 3). Además, de las 138 empresas apoyadas por el Proyecto, 10 empresas se unieron recientemente a los clústeres automotrices, y un total de 24

empresas continuaron siendo miembros, lo cual confirma que los resultados superaron el objetivo inicial de 12 empresas (Indicador 4). Además, de acuerdo con los resultados de la encuesta de impacto en las empresas participantes, 50 empresas (98%) de las empresas que utilizaron el servicio (51 respuestas válidas) respondieron que su competitividad había mejorado (Indicador 5).

Como ya se ha mencionado antes, se ha confirmado que los indicadores 2 a 5 del objetivo del Proyecto han superado con creces las metas. No hace falta mencionar que la alta evaluación en los resultados de utilización por estas empresas (Indicador 2) y la continuidad (Indicadores 3 y 4) y la satisfacción desde la perspectiva de la mejora de la competitividad empresarial (Indicador 5) fue una corroboración importante para la aprobación y la implementación continua del Plan de Implementación posterior a la terminación del Proyecto (Master Plan) en cada Estado (Indicador 1).

Se han institucionalizado en el Estado de Aguascalientes un Master Plan y un presupuesto relacionado, y también en los Estados de Querétaro y San Luis Potosí se tiene planeado un sistema híbrido con las actividades mediante la "financiación independiente" dirigidas por su Clúster Automotriz y la utilización de presupuestos de desarrollo sectorial de cada gobierno estatal. De hecho, en el seminario celebrado a finales del año pasado para presentar los resultados obtenidos, los gobiernos estatales y sus Clústeres Automotrices presentaron un Master Plan (programa de convocatoria) para 2024, de esta manera se ha confirmado el logro de las metas de los indicadores dentro del plazo del Proyecto. De igual manera, el Estado de Guanajuato, encabezado principalmente por la Secretaría de Desarrollo Económico Sustentable, ha confirmado su firme compromiso para continuar ejecutando el Master Plan (2024) posterior a la terminación del Proyecto, y hay alta perspectiva para asegurar el presupuesto necesario para continuar con las actividades relacionadas como los eventos de encuentros comerciales. Todos estos factores permiten considerar alta la posibilidad de lograr el objetivo del Proyecto.

(3) Nivel de satisfacción de las empresas y la perspectiva de la competitividad empresarial

Igualmente, como indicadores de los objetivos del Proyecto se verifican el nivel de satisfacción por parte de las empresas que utilizaron el esquema de apoyo (Indicador 2 del objetivo del Proyecto) y las necesidades de utilización continua del mismo (Indicador 3 del objetivo del Proyecto). Según las encuestas de impacto aplicadas desde noviembre de 2023, se ha confirmado en sus respectivos indicadores un alto nivel de satisfacción y las expectativas para futuros esquemas de apoyo de 2024 en adelante. Además, desde la perspectiva del desarrollo de competitividad empresarial de las empresas participantes que utilizaron el esquema de apoyo (Indicador PP-5), se han obtenido los resultados de que el Proyecto "ha contribuido significativamente al desarrollo de recursos humanos tales como aquellos empleados núcleo y/o de nivel medio que promuevan las actividades internas de KAIZEN", determinados como clase objetivo del Proyecto. Como una de sus razones se menciona que "incluso hasta la fecha la empresa pensaba haber venido promoviendo

actividades de KAIZEN como parte de las medidas anuales, pero cada uno de los Departamentos, como Ingeniería, Aseguramiento de Calidad o Producción, estaban trabajando por separado. Ahora, en este Proyecto todos unidos en la empresa como un actor integral han desarrollado las actividades de KAIZEN y trabajando por algunos temas comunes en colaboración entre diversos Departamentos, pudieron experimentar que sería posible obtener grandes resultados". También, para la mayor parte de las empresas "es difícil preparar sus propios programas de desarrollo de recursos humanos, por otro lado, solamente participando en algunos cursos externos de capacitación y aprendiendo lo básico, no siempre se pueden esperar efectos favorables en términos de la administración empresarial." "A través de la capacitación básica y la asistencia práctica del Proyecto de JICA, se ha podido comprender que para utilizar al máximo el conocimiento básico y conducir a generar efectos en la administración empresarial, es indispensable entrenar en escenarios prácticos." "Como consecuencia, algunos participantes de la capacitación en Japón en este Proyecto fueron promovidos a los cargos superiores tales como jefe de sección o subdirector de planta, etc.", mencionando, así como resultados obtenidos.

(4) Factores de contribución

Los factores principales que aumentan la efectividad del Proyecto son los siguientes:

- i. Para este Proyecto se designaron como contraparte no sólo las Secretarías de Desarrollo Económico de cada gobierno estatal, sino también los respectivos Clústeres Automotrices. Estas últimas instituciones han desempeñado un papel importante en el sentido de que pudieron llevar a cabo actividades continuas, independientemente de las elecciones de gobernadores estatales y de los cambios de funcionarios. Incluso en el Estado de Aguascalientes, donde no existe una asociación de clúster automotriz, para minimizar la influencia de posible paralización de trabajos debido al nombramiento de nuevos funcionarios por el cambio de administración, etc., se han tomado medidas muy efectivas, tales como una entrega eficiente de cargos, intercambio de opiniones para promover una mejor comprensión del Proyecto, etc., lo cual condujo a gestionar el Proyecto sin problema y materializar los resultados esperados.
- ii. Los expertos japoneses encargados de la capacitación y la asistencia en KAIZEN en el piso de producción estaban formados por personas procedentes de empresas fabricantes de automóviles o autopartes, lo que les permitió identificar de manera precisa y predictiva los problemas a los que se enfrenta el sector automotriz de México en términos de actividades de producción y desarrollo de recursos humanos. Además, estos expertos altamente especializados en las tecnologías elementales, tales como corte de precisión, prensado y moldeo por inyección de plástico, se encargaron de proporcionar la asistencia en KAIZEN en el piso de producción de acuerdo con el tipo de negocios y ramas industriales de cada empresa, lo que permitió una transferencia de tecnología efectiva.

- iii. El nivel de desarrollo del capital humano núcleo que se requiere en el sector automotriz es nada menos que una competencia de "nivel global", como lo demuestra la calidad requerida para los vehículos fabricados en México. Al respecto, la identificación y la formación de candidatos a "entrenadores (mexicanos) de Kaizen", que juegan un papel central como mecanismo para facilitar las actividades de KAIZEN de los proveedores de autopartes, se realizaron no solamente con los recursos como consultores privados y profesores universitarios, sino también prestando atención a los recursos internos de empresas Tier-1 y Tier-2 que enfrentan con sus problemas en las actividades diarias de producción en el sector automotriz, lo cual ha permitido el desarrollo de recursos mexicanos suficientemente competentes.
- iv. Al estudiar sistemas y programas para promover las actividades de KAIZEN de los proveedores de autopartes, se tomó en consideración que el presupuesto de la Secretaría de Desarrollo Económico de cada Estado era limitado y que la prioridad y el monto para la ejecución del presupuesto podrían variar debido a factores externos como medidas de apoyo industrial ante la reciente propagación de COVID-19. Por lo tanto, también se tomó en cuenta desarrollar un Master Plan (realización de capacitaciones y actividades de KAIZEN en el piso de producción) mediante un sistema de financiación independiente. De hecho, en el Estado de Querétaro se implementó a prueba dicho plan (realización de capacitación de pago) dentro del período del Proyecto, lo cual se considera que contribuyó a la formulación de un Master Plan factible.

(5) Factores de impedimento

Se muestran a continuación los factores que impiden la efectividad del presente Proyecto:

i. Con motivo del empeoramiento de la seguridad pública en el Estado de Guanajuato (particularmente en las ciudades de Celaya, Irapuato, León y Salamanca y sus respectivos alrededores²), se supone el riesgo de restricciones a realizar diversas actividades.

5.1.4 Eficiencia

Las aportaciones de las partes japonesa y mexicana se han utilizado de forma eficaz, incluyendo la decisión adecuadamente tomada para extender el período del Proyecto afectado por COVID-19. Además, también se observan sinergias con otros proyectos ejecutados por JICA. Con base en lo anterior, se considera una eficiencia "alta" del Proyecto.

Zonas de peligro para viajar debido al incremento en el número de delitos, publicadas por el Asesor de Seguridad de la Oficina de JICA México

(1) Extensión del período del Proyecto

En la cuarta reunión de JCC celebrada en noviembre de 2022, se acordó extender el período del Proyecto por aproximadamente 10 meses más hasta marzo de 2024, en vez de terminar originalmente en mayo de 2023, teniendo en cuenta el impacto ocasionado por la restricción de actividades durante casi dos años debido a la propagación de la pandemia de COVID-19, la restricción de actividades, principalmente de la asistencia en Kaizen en el piso de producción, las cuales eran indispensables para formar a los "entrenadores mexicanos de Kaizen", y fueron sustituidas por la asistencia en línea. Gracias a este acuerdo, se hará posible terminar el Proyecto superando los objetivos iniciales en cuanto a los indicadores relativos al desarrollo de "entrenadores mexicanos de KAIZEN", que no se habían alcanzado en el momento de la extensión del período, por lo que se puede considerar que dicha extensión fue una medida muy adecuada.

(2) Costes de operación del proyecto

En el cuadro de evaluación preliminar, el coste total de operación del proyecto estaba previsto en 780 millones de yenes (aproximadamente 89,7 millones de MXN). En contraste, el coste real estimado del proyecto al final del mismo (en marzo de 2024) fue de 906 millones de yenes (aproximadamente 104 millones de MXN), lo que supone aproximadamente el 116% del coste previsto del proyecto. A pesar del impacto de la propagación de la infección por COVID-19, los cambios en la estructura de ejecución debido al regreso anticipado del experto de largo plazo contratado directamente por JICA y la depreciación del yen, el proyecto fue eficiente en términos generales en cuanto a aportaciones.

(3) Toma de medidas flexibles durante la pandemia de COVID-19

La pandemia mundial de COVID-19 afectó las actividades del Proyecto en varios aspectos, tales como la declaración de contingencia sanitaria tanto en Japón como en México, toque de queda, y restricciones a los visitantes en los proveedores de autopartes, etc. Pero, incluso durante el período en que los expertos japoneses de la JICA no pudieron viajar a México, fue efectiva la forma flexible de la gestión del Proyecto, por ejemplo, desarrollando "materiales On demand (distribución exclusiva en YouTube)" y buscando medidas viables a través de formación vía remota.

(4) Capacitación en Japón

Hasta la fecha se han realizado un total de cuatro cursos de capacitación en Japón. La primera capacitación en Japón, organizada poco después del inicio del Proyecto, estuvo dirigida a los funcionarios públicos mexicanos (contraparte) con el objetivo de aprender las medidas de Japón para promover la industria automotriz y algunos ejemplos de vinculación empresarial-académica-gubernamental con el sector automotriz (modelos de las prefecturas de Fukuoka e Hiroshima). Posteriormente, en la segunda hasta la cuarta capacitación en Japón, realizadas para la formación de entrenadores mexicanos de KAIZEN que participaban en el Proyecto, se programaron visitas a

los fabricantes japoneses de automóviles o autopartes para observar los resultados de sus iniciativas de actividades de KAIZEN, así como se realizaron ejercicios prácticos de KAIZEN (operaciones de producción) en el Centro de Aprendizaje de Nissan. Estos contenidos de capacitación fueron muy útiles, creando efectos sinérgicos con las actividades de KAIZEN en el piso de producción y las capacitaciones intensivas en México. En particular, prácticamente al principio del Proyecto, a través de algunos casos japoneses, los participantes de contraparte mexicana pudieron conocer en forma concreta ciertas imágenes de los efectos esperados y las metas del Proyecto. Esto les permitió comprender el "significado del sistema de apoyo" por el que tendrían que trabajar en colaboración entre el sector automotriz y las autoridades gubernamentales, así como los llevó a "fomentar su iniciativa como parte de los actores", por lo tanto, se considera que lo anterior ha servido para llevar a cabo posteriormente las actividades en forma eficiente.

(5) Efectos sinérgicos con el Proyecto de Formación de Recursos Humanos para la Industria Automotriz

Entre las empresas seleccionadas para este Proyecto se encontraban algunas que participaron en el anterior Proyecto de Formación de Recursos Humanos para la Industria Automotriz ejecutado por JICA y en aquel entonces aceptaron a los estudiantes para sus prácticas profesionales y/o los egresados de bachilleratos, lo cual permitió confirmar una alta valoración del apoyo que JICA ha venido brindando desde hace tiempo con los Proyectos, desde la formación de recursos humanos en el ámbito educativo hasta la asistencia en KAIZEN en el piso de producción. Además, algunos "docentes núcleo de CONALEP" formados en el anterior Proyecto de Formación de Recursos Humanos para la Industria Automotriz se desempeñaron ahora como candidatos a entrenadores locales de KAIZEN en el presente Proyecto, el papel de instructores en las capacitaciones intensivas realizadas en los Estados de Querétaro y Guanajuato, y así se ha observado la generación de efectos sinérgicos. De esta manera, se les permitió a los docentes núcleo de CONALEP comprender, a través de las actividades de formación y la asistencia de KAIZEN en el piso de producción, las iniciativas que desarrollan las empresas en sus áreas de producción, y obtener una valiosa oportunidad para conocer los requisitos de recursos humanos que desean las empresas. Se espera que esto contribuya significativamente al sector automotriz, incluso en cuanto a la misión del CONALEP de "producir continuamente los recursos humanos requeridos por el sector industrial".

(6) Factores de impedimento

El retorno antes del cumplimiento del período del experto de largo plazo contratado directamente por JICA provocó la ausencia de un líder en la estructura del equipo japonés del Proyecto, lo que causó una confusión paralizando temporalmente las actividades del Proyecto, así como una gran perturbación en las partes interesadas del Proyecto, tanto de Japón como de México.

5.1.5 Impacto

Desde el punto de vista del Objetivo Superior "Incrementar la participación de los proveedores de autopartes mexicanos en la cadena de valor automotriz", se han identificado muchos impactos positivos. Si bien hay factores de contribución, tales como la influencia de la "relocalización (Nearshoring)" principalmente de América del Norte y la "presencia creciente de la industria automotriz mexicana" en el USMCA (T-MEC), también hay preocupación por factores de impedimento como la propagación de COVID-19 y la reestructuración de la cadena de proveeduría debido al cambio al VE (vehículo eléctrico).

(1) Perspectivas del logro del Objetivo Superior

Debido a la pandemia de COVID-19, el sector automotriz de México sufrió una reducción de producción, pero desde la segunda mitad de 2023 en muchas empresas se observa una recuperación en forma de V con respecto al volumen de producción, mostrando una tendencia recuperativa al nivel que tenían antes de la reducción de producción obligado por COVID-19.

Por otro lado, se supone que también en la región objetivo de El Bajío se produzca gradualmente la influencia del cambio al VE y, en este sentido, podría disminuir la escala de negocios de la cadena de proveeduría que constituye la actual industria de autopartes, pero aún no está claro qué tanto será el impacto que sufriría en los próximos tres años aproximadamente. Cabe mencionar que por el momento no se ha identificado ningún impacto negativo manifestado del cambio al VE, ya que hay alta probabilidad de que la demanda de vehículos eléctricos se agregue a la producción actual de vehículos convencionales, y podría haber posibilidad de convertirse en un impacto positivo (aumento del volumen de producción de autopartes).

Aunado a lo anterior, el sector automotriz se está enfrentando a cambios rápidos tales como el cambio al VE, vehículo autónomo y conectado, etc. Ante esta situación, será cada vez más importante, además de desarrollar continuamente la capacidad de MONOZUKURI que se ha cultivado hasta la fecha, contar con la capacidad de MONOZUKURI en cada una de las empresas (competitividad empresarial) para responder a desafíos ante estos cambios y construir una cadena de proveeduría sostenibles, para lo cual, es necesario seguir trabajando en cooperación entre el sector industrial y las Secretarías de Desarrollo Económico.

(2) Impacto en el sector industrial

1) Freno a la deserción laboral (spin-out), problema crítico para el sector automotriz de México Incluso después de iniciar el Proyecto, el sector automotriz mexicano sigue teniendo una expectativa para un desarrollo industrial dinámico, incluyendo la llegada de un OEM coreano (KIA) y el plan de Tesla por su participación en México (la producción comenzará aproximadamente en 2026). Ante este escenario, también se está poniendo aún más grave el

problema de la fuga de excelentes recursos humanos, que tradicionalmente ha sido un tema serio. Sin embargo, una de las empresas locales apoyadas por JICA ha logrado reducir la tasa de rotación en un 35% con respecto al año pasado y se han notado efectos positivos al cambiar la conciencia de los empleados promoviendo la difusión de técnicas de KAIZEN (ejemplo: MexStamp). Asimismo, los empleados que han aprendido a "pensar y actuar" llegaron a ser capaces de apoyar y explicar a sus miembros y compañeros en el piso de producción utilizando la lógica adecuada (con razonamiento), siendo nombrados para cargos de supervisión incluso sin que tuvieran títulos universitarios, lo anterior ha mejorado prácticamente la competitividad en MONOZUKURI (ejemplo: Kitagawa). Hablando de otros casos, anteriormente, aunque los operadores comunicaban a sus directores y/o supervisores las dificultades que tenían en el piso de producción, les parecía que éstos tenían poco interés en comprender realmente la situación, pero, a medida que se pusieron en práctica los pasos de QC Story en este Proyecto, los miembros directivos y supervisores empezaron a acudir a ver la situación real del piso de producción, y además la entrevista con los operadores y el intercambio de opiniones se han llegado a aplicar de manera constante. Esto les ha permitido a los operadores sentir el deseo de trabajar por mucho tiempo si se trata de una empresa así (varias empresas). Igualmente, se presentó como buenas prácticas la implementación de un sistema de sueldos preferentes para el personal destacado, como supervisores (ejemplo: EKK), y así se han observado ciertos efectos de frenar la deserción laboral de recursos humanos excelentes.

2) Ampliación del ambiente para el desempeño laboral de mujeres

Tradicionalmente, en un piso de producción la mayoría de los gerentes han sido empleados masculinos, pero ahora está aumentando aceleradamente en el piso de producción el nombramiento de mujeres como gerentes, ya que a través de las actividades del Proyecto las empleadas han recibido capacitación como entrenadoras de KAIZEN tanto como los empleados masculinos (más del 38%; es decir, 18 de los 47 entrenadores de Kaizen son mujeres). Por ejemplo, en una empresa local del Estado de Querétaro, una entrenadora capacitada fue promovida a subdirectora de planta, y en una empresa local (Tier-2 japonés) del Estado de San Luis Potosí, otra entrenadora formada fue promovida a gerente de un departamento nuevo que promueve actividades de reducción de costes en toda la empresa.

3) "Fomento de una cultura de MONOZUKURI" mediante vínculos de comunicación en las empresas a través de las actividades de KAIZEN en el piso de producción

En las visitas para la encuesta de evaluación de impacto, en casi todas las empresas apoyadas se pudieron confirmar sus comentarios de que "las actividades de KAIZEN apoyadas por el Proyecto han cambiado la cultura empresarial hacia un camino favorable". En otras palabras, se ha generado una motivación autónoma entre los empleados a través de las actividades de KAIZEN; se ha establecido una comunicación fluida desde abajo hasta arriba entre trabajadores, supervisores y directores; y se ha creado una relación de confianza en el piso de producción a través de la

aplicación de criterios de promoción de acuerdo con la capacidad. Con base en estos avances observados, se puede esperar también para el futuro el fomento de una cultura de MONOZUKURI adecuada para la industria de autopartes en México.

(3) Otros impactos

1) Efectos spillover de los resultados obtenidos en los anteriores proyectos de JICA

Se espera que el presente Proyecto pueda utilizar de manera efectiva los proyectos anteriores de JICA y que tenga efectos spillover, en particular, de los resultados obtenidos en el Proyecto de Formación de Recursos Humanos para la Industria Automotriz. Por ejemplo, Kitagawa, empresa Tier-2 con capital japonés, ha aceptado en 2023 un total de 23 estudiantes procedentes de los planteles modelo de CONALEP para sus prácticas profesionales. Los estudiantes mismos pueden aprender ahí recibiendo un sueldo, y así se producen ventajas en ambas partes, por lo que en el futuro la empresa tiene previsto aceptar más, a un máximo de 27 estudiantes.

Aunado a lo anterior, algunos docentes núcleo participantes del Proyecto antes mencionado con CONALEP fueron designados como entrenadores de KAIZEN (recursos externos fuera de empresa), formados en el presente Proyecto, y de esta manera se espera activar aún más la vinculación entre los sectores educativo e industrial con una relación ganar-ganar. Con estos efectos sinérgicos se puede esperar que contribuyan a la parte de CONALEP para sus necesidades de mayor difusión y expansión de los planteles modelo, y al sector industrial para sus necesidades de producir el excelente capital humano calificado.

Además, para el futuro, se espera que los sectores educativo e industrial trabajen juntos para formar los recursos humanos necesarios para el sector automotriz, y que ambas partes amplíen sus actividades trabajando en colaboración para que dichos recursos humanos formados muestren gran desempeño en el sector industrial y tengan una motivación y satisfacción de trabajar. Como resultado, se espera contribuir al desarrollo económico y al desarrollo sostenible de la sociedad, así como conducir a la realización de una sociedad de bienestar.

2) Posible contribución a otros Estados

En realidad, la cadena de proveeduría automotriz en los cuatro Estados objetivo no se limita dentro de sólo un Estado, sino que existe extendida atravesando la demarcación territorial de las entidades estatales. En los Estados de Aguascalientes, Querétaro y San Luis Potosí, se ha presentado un Master Plan (2024) como "sistema de apoyo que promueve la participación de los proveedores de autopartes en la cadena de valor automotriz" y se desarrollarán algunas acciones enfocadas en encuentros comerciales, capacitaciones y actividades de KAIZEN en el piso de producción. En estas acciones, como medios para su desarrollo efectivo y horizontal atravesando territorios de cuatro Estados objetivo, se considera que puede ser útil utilizar los siguientes dos organismos:

- ◆ Utilización de la Red Nacional de Clústeres de la Industria Automotriz (REDCAM)³
- ◆ Utilización de la Agencia para la Cooperación Económica Centro-Bajío-Occidente (ACBO)⁴

La REDCAM es una red conformada por varios clústeres de diferentes Estados, entre ellos se incluyen el Clúster Automotriz de Guanajuato (CLAUGTO), Clúster Automotriz de Querétaro y Clúster Automotriz de San Luis Potosí (CASLP) que también son contrapartes del presente Proyecto y, además, el Clúster Automotriz de Nuevo León (CLAUT) que trabajaron juntos durante el pasado proyecto de JICA (Proyecto para el Fortalecimiento de la Cadena de Proveeduría del Sector Automotriz). Por lo tanto, se pueden esperar impactos positivos y beneficios en términos de difusión y promoción de las actividades de capacitación y KAIZEN. El Presidente de la REDCAM es el Director General del Clúster Automotriz de Querétaro, por lo tanto, las actividades del proyecto y el Master Plan futuro lo han compartido a los miembros de otros estados.

Por otra parte, la ACBO ha creado la "Alianza Centro-Bajío-Occidente Punto Biz" como una plataforma de información de las cadenas de proveeduría en la región objetivo, incluyendo el Estado de Jalisco, y la ofrece como información de base de datos a las empresas ubicadas en la región. Por lo cual, se puede esperar que esto contribuya al logro del Objetivo Superior del presente Proyecto, ya que permitirá no sólo la difusión y promoción de los Resultados Esperados 2 y 3 del mismo, es decir, la asistencia en KAIZEN en el piso de producción (Resultado Esperado 2) y el sistema de capacitación para las empresas (Resultado Esperado 3), sino también la difusión y ampliación del apoyo para encuentros comerciales (Resultados Esperados 1).

5.1.6 Sostenibilidad

En aspectos político e institucional, organizacional y técnico, la sostenibilidad es alta. Por otra parte, existen incertidumbres de las afectaciones por factores externos como las próximas elecciones estatales, pero se han confirmado firmes compromisos para garantizar la continuidad en aspectos políticos e institucionales. En aspectos financieros, se observa un posible problema de retraso en la ejecución del presupuesto federal, causada por la elección presidencial del gobierno federal. Sin embargo, es alta la perspectiva de asegurar los recursos económicos necesarios para realizar las actividades. Por lo anterior, se puede considerar que este Proyecto muestra una **sostenibilidad "alta"**.

Red Nacional de Clústeres de la Industria Automotriz (REDCAM): Red que se compone por los clústeres automotrices de los Estados de Nuevo León, Coahuila, Chihuahua, San Luis Potosí, Querétaro, Guanajuato, Jalisco, Aguascalientes y otors.

Agencia para la Cooperación Económica Centro-Bajío-Occidente: Esta agencia fue creada por cinco entidades estatales (cuatro Estados objetivo del presente Proyecto, más el Estado vecino de Jalisco), y tiene como finalidad promover bajo colaboración de cinco estados los trabajos en cuatro ejes, los cuales constituyen en tres temas principales del presente Proyecto (desarrollo de recursos humanos, desarrollo de cadenas de proveeduría e intercambio de buenas prácticas) más la "sostenibilidad de capacidad energética".

(1) Aspectos político e institucional

En el aspecto político, el respaldo necesario para mantener los efectos del Proyecto se puede considerar altamente sostenible desde las perspectivas de la importancia del sector automotriz que incide en las Secretarías de Desarrollo Económico de cada gobierno estatal. Además, dado que en los planes de desarrollo económico de los cuatro Estados objetivo de la región de El Bajío, donde se concentra la industria automotriz, se da importancia al desarrollo y aseguramiento de recursos humanos de alto nivel para esta industria. Por lo tanto, en el aspecto institucional, es muy probable que se garantiza y se mantenga el sistema de respaldo para las políticas de apoyo a los proveedores de autopartes de cada Estado.

Por otra parte, el esquema de apoyo probado y formulado en el Proyecto ha sido adoptado por parte de la Secretaría de Desarrollo Económico y el Clúster Automotriz de los Estados objetivo como Master Plan para 2024, y de hecho se ha empezado su implementación como programa de convocatoria 2024, por lo cual se espera una alta posibilidad de institucionalizar y continuar las actividades del Proyecto en adelante.

(2) Aspecto organizacional

Los elementos que se consideran necesarios para garantizar la sostenibilidad de los efectos del Proyecto serían los actores (Facilitadores) que ejecutan planes de apoyo a los proveedores de autopartes de los Estados y otros actores (Expertos Técnicos) que los implementan en el piso de producción.

Los Facilitadores corresponden a las Secretarías de Desarrollo Económico y los Clústeres Automotrices de cada Estado, y los responsables serán la "Dirección de Fomento Industrial", "Departamento de Cadenas Productivas de la Dirección de Desarrollo Empresarial", "Dirección de Cadena Productiva Automotriz" y "Dirección General de Desarrollo y Promoción Industrial" de sus respectivas Secretarías de Desarrollo Económico. Por otro lado, los Expertos Técnicos corresponden a aquellos "entrenadores de KAIZEN" formados en el Proyecto (más de 10 entrenadores por cada uno de los cuatro Estados), quienes tomarán cargo de instructor en capacitaciones y/o entrenador en la asistencia de KAIZEN en el piso de producción, siendo como entrenadores registrados ante su respectiva Secretaría de Desarrollo Económico o Clúster Automotriz. Incluso durante el Proyecto se ha venido probando continuamente este sistema de vinculación empresarial-académica-gubernamental y se observan buenas perspectivas para su funcionamiento establecido. Con base en lo anterior, se considera una sostenibilidad alta en el aspecto organizacional.

(3) Aspecto financiero

En cuanto al aspecto financiero, en el Estado de Aguascalientes, el presupuesto operativo para 2024 ya fue aprobado por la Asamblea Estatal, y se puede esperar que continúen las actividades con el

presupuesto del gobierno estatal, al menos mientras que haya necesidades industriales en el Estado (promoción de la industria automotriz, fomento del empleo, etc.).

En el Estado de Querétaro, aunque no se basa en un sistema de medidas presupuestarias, el Clúster Automotriz actúa como facilitador, y en su caso oportunamente se financiarán fondos necesarios por parte de la Secretaría de Desarrollo Económico Sustentable bajo el marco del "Programa de Desarrollo de Proveedores Locales en Querétaro". Sin embargo, por ser limitado el presupuesto de la Secretaría de Desarrollo Económico, ya se ha establecido un mecanismo de financiación independiente por parte del Clúster Automotriz (prestación de servicios como capacitación y asesoría de Kaizen en piso de producción con costo), por lo tanto, se considera menos vulnerable el factor presupuestario del Estado de Querétaro y se puede esperar que sus actividades continúen.

Igualmente, en el Estado de San Luis Potosí, se puede esperar una continuidad de las actividades, ya que es muy probable que el Clúster Automotriz sea el organismo ejecutor y adopte un sistema para asegurar el presupuesto operativo mediante la prestación de servicios con base en la financiación independiente.

Mientras tanto, en el Estado de Guanajuato, en este año hay elecciones estatales, además la presidencial del gobierno federal, por lo que en este momento no está asegurado el importe presupuestario. Pero, para este año, ya está confirmada la celebración del "Foro Automotriz" que es un evento de encuentros comerciales automotrices más importante de México, y el Secretario de Desarrollo Económico Sustentable de Guanajuato mostró un firme compromiso de continuar con el Master Plan posterior a la terminación del Proyecto (2024) y asegurar presupuesto necesario. Además, considerando la importancia de la industria automotriz (sobre todo, la industria automotriz de origen japonés) en este estado, es alta la perspectiva de la continuidad de estas actividades y el aseguramiento de presupuesto necesario. Por otra parte, se está estudiando la posibilidad de implementar capacitaciones mediante un sistema de pago por servicio, además del presupuesto estatal. Por todo lo anterior, se considera baja la fragilidad de las medidas presupuestarias.

(4) Aspecto técnicos (recursos humanos)

Desde el punto de vista de la evaluación de la capacidad de los "entrenadores registrados de KAIZEN", que es uno de los puntos importante en el Master Plan posterior al Proyecto, se califica que tienen una capacidad suficiente para actuar como instructores en capacitaciones y/o entrenadores en la asistencia de KAIZEN en el piso de producción en cada Estado, basándose en su conocimiento y experiencia adquirida en las actividades de KAIZEN en el piso de producción y cursos de capacitación en Japón realizados durante el Proyecto, además de sus actividades diarias de producción (en caso de aquellos entrenadores de KAIZEN internos de empresas). Además, muchos directivos esperan que ellos vayan mejorando el nivel de sus habilidades desempeñando

un papel central en futuras actividades de producción en la empresa. Por otra parte, se puede esperar que incluso aquellos candidatos a entrenadores que no hayan alcanzado una calificación de aprobado al finalizar el Proyecto sigan mejorando más su capacidad mediante futuras actividades de KAIZEN dirigidas por los entrenadores registrados de KAIZEN, y también se tiene una expectativa de que el personal competente que haya alcanzado la edad de jubilación actúe como consultores locales o entrenadores de KAIZEN registrados ante diferentes Estados. Por lo anterior, se puede considerar que la sostenibilidad es alta en estos aspectos técnicos.

5.1.7 Conclusión

Las actividades del Proyecto se están desarrollando, en su mayoría, conforme a lo planeado y los 4 Resultados Esperados también se han manifestado bien (algunos de ellos mucho más de lo esperado). El Proyecto establece los objetivos que concuerdan con los propósitos tanto de la parte mexicana como de la japonesa, teniendo un adecuado enfoque de asistencia y una pertinencia "alta". Con respecto al objetivo del Proyecto, el grado de logro de cada indicador es alto, contribuyendo al logro del objetivo del Proyecto. Sobre la base de todos estos factores, están aumentando la posibilidad de lograr los objetivos del Proyecto. Además, los resultados obtenidos más de lo previsto muestran que la efectividad del Proyecto es "alta". Asimismo, se llevó la gestión del Proyecto en forma flexible incluso durante la pandemia de COVID-19, y la extensión del período del Proyecto se determinó por razones apropiadas, tanto que posteriormente se han identificado sus efectos favorables, por lo que se considera "alta" la eficiencia del Proyecto.

En cuanto a las perspectivas de lograr el Objetivo Superior, es cierto que se ha identificado una serie de factores inciertos como las afectaciones por la tendencia al cambio a los vehículos eléctricos, pero también se han observado numerosos impactos positivos a la industria, y hay factores que contribuyen, tales como la reubicación de bases productivas (Nearshoring) principalmente de EE.UU., la presencia creciente de México en el USMCA (T-MEC), por lo que se espera que se alcance la Meta Superior.

Se puede esperar una alta sostenibilidad en los aspectos político, organizacional y técnico, y también en el aspecto financiero se han identificado ciertas medidas para reducir la vulnerabilidad en el presupuesto estatal, preparando fondos operativos mediante una financiación independiente sin depender únicamente del presupuesto de la Secretaría de Desarrollo Económico de los gobiernos estatales, por lo tanto, finalmente se considera que la sostenibilidad es "alta".

5-2 Ideas o consideraciones por las que hubo efectos en la implementación y los resultados del Proyecto

(1) Desarrollo de los entrenadores de Kaizen enfocado en las necesidades de apoyo a la industria automotriz (nivel global)

Las necesidades de apoyo en cuanto a la calidad (Q), el costo (C) y la entrega (D) requeridos por la cadena de suministro de las autopartes en México son los mismos requeridos por el mercado

global. Además, las competencias de los entrenadores de Kaizen que se desarrollan mediante este Proyecto deben ser aquellas que puedan satisfacer las necesidades de apoyo a nivel global. Por esta razón, para buscar e identificar a los candidatos a entrenadores de Kaizen a ser desarrollados, se establecieron los criterios de selección rigurosos en diversos aspectos como, por ejemplo, la experiencia en Monozukuri en la industria manufacturera y experiencia en las actividades de Kaizen en piso de producción en las que se aplican las técnicas de control de calidad y de producción. Asimismo, se decidió, como lineamiento principal, considerar no solo los recursos externos a la cadena de proveeduría de autopartes tales como docentes de universidades, consultores privados, centros de tecnología e instituciones de formación de recursos humanos, sino también aprovechar recursos humanos destacados que trabajan en los proveedores de autopartes (Tier1 y Tier2), que son las personas que se enfrentan día con día a los problemas en sus actividades de producción y aplican repetidamente el ciclo de PDCA. Todo esto permitió desarrollar a los entrenadores de Kaizen capaces de atender las necesidades de apoyo a nivel global para los proveedores de autopartes.

(2) Medidas flexibles ante la pandemia del COVID-19 inesperada (desarrollo del material didáctico *On demand*)

En marzo de 2020, se declaró también en México la emergencia sanitaria debido a la propagación rápida del COVID-19, y se suspendieron temporalmente las actividades socioeconómicas incluida la industria automotriz. Por otro lado, los expertos de JICA no podían viajar y realizar las actividades en México, por lo que se tuvieron que desarrollar las actividades del Proyecto vía remota durante un año y medio. Mientras tanto, la parte mexicana respondía a las necesidades de la industria automotriz mediante encuentros de negocios en línea y eventos de encuentros comerciales a través de Webinar ya que se prohibieron reuniones y eventos con aglomeraciones. Asimismo, el equipo de expertos de JICA desarrolló el material didáctico On demand (40 módulos: aproximadamente 8 horas) con audio en español e implementó la asistencia a Kaizen por medio de reuniones virtuales, tomando medidas flexibles y de forma ágil ante esta contingencia. Se considera que gracias a estas acciones se logró minimizar el atraso en las actividades del Proyecto provocado por el COVID-19.

6. Para el logro de la meta superior después de la finalización del proyecto

6.1 Perspectiva del logro de la Meta Superior

A continuación se muestran los contenidos de los indicadores de la Meta Superior y sus logros obtenidos a la fecha de febrero de 2024.

Overall Goal: Participation of Mexican Auto Parts Suppliers in automotive supply chain is increased in the target states.

Indicador	Grado de Alcance
Indicator 1: More than 10% Mexican Auto	Por causas de la pandemia del COVID-19 y la falta de suministro
Parts Suppliers start or expand their	de semi-conductores, casi todos los proveedores de autopartes de
business in the automotive supply chain in	México tuvieron que reducir drásticamente el volumen de ventas
the target states.	y producción, pero en 2023 la producción de automóviles en
	México ha aumentado un 14.23%, anual llegando a producir unos
	3.77 millones de unidades, y de esta manera se recuperó la
	producción al nivel que superó unas 30,000 unidades en
	comparación con el nivel de producción de 2019, año antes de
	presentar los problemas de COVID-19 y la escasez de suministro
	de semi-conductores. (INEGI, enero de 2024)
Indicator 2: More than 10% Mexican Auto	Durante de Proyecto (2018-2023) Más del 90% de las empresas
Parts Suppliers gain a certain level of	participantes en el Proyecto tuvieron éxito en lograr sus objetivos
competitiveness to initiate business	de Kaizen en calidad (Q), costo (C) y entrega (D).
negotiations in the automotive supply chain	Por lo tanto, con este contexto, existe alta posibilidad de que las
in the target states.	empresas proveedoras alcancen su competitividad a través de los
	programas que cada estado implemente post Proyecto.

Como se menciona arriba, a la fecha de febrero de 2024 todavía no hay perspectiva clara de logar la Meta Superior. Sin embargo, con respecto al indicador-1, estimamos poder esperar un aumento en la participación en la cadena de proveeduría (10% o más) al continuar con el programa de fortalecimiento de la cadena de proveeduría automotriz en cada estado, ya que la presencia de México como base de producción de autopartes en la región de América del Norte es cada vez mayor.

Además, con respecto al indicador-2, más del 90% de las empresas que participaron en actividades de asistencia en Kaizen en piso de producción (de la 1ra a 5a etapa) en los cinco años que van de 2019 a 2023 lograron alcanzar las metas de temas de Kaizen relacionados con la calidad (Q), el costo (C) y el tiempo de entrega (D), y muchas empresas en la encuesta de impacto dijeron que estaban "fortaleciendo la competitividad en términos de piso de producción y desarrollo de recursos humanos". Basándonos en la respuesta positiva, estimamos que se puede esperar que la continuación del programa de fortalecimiento de la cadena de proveeduría en el futuro fortalezca la competitividad de más del 10% de las empresas.

Número de proveedores mexicanos de autopartes que participan en la cadena de valor automotriz

Debido a la pandemia de COVID-19 y la escasez de semiconductores, casi todos los proveedores mexicanos de autopartes se vieron obligados a reducir drásticamente sus volúmenes de comercialización y producción durante aproximadamente dos años a partir de 2020. Sin embargo, de acuerdo con un reporte del Instituto Nacional de Estadística y Geografía (INEGI) publicado en enero de 2024, la producción de automóviles en México aumentó a 3.3 millones de unidades (incremento del 9.2% anual) en 2022 (enero-diciembre) y 3.77 millones de unidades en 2023 (enero-diciembre) con una tasa de crecimiento anual del 14.23%. Esto significa que la producción

se ha recuperado hasta un nivel de 30,000 unidades por encima del nivel de producción de 2019 (3.74 millones de unidades) antes de la COVID-19 y la escasez de semiconductores.

De igual forma, el número de miembros de la Red de Clústeres de la Industria Automotriz de México (RECAM) ha aumentado a 11 asociaciones de clústeres (más de 600 empresas) en 2023, lo que confirma la madurez de la cadena de proveeduría automotriz de México.

Además, la inversión manufacturera en México ha alcanzado un máximo histórico en 2023 debido a la tendencia del nearshoring (reubicación de bases de producción). El Banco de México dio a conocer el "Informe Económico Regional Trimestral" (septiembre de 2023) y el informe especial de "Encuesta de Opiniones Corporativas sobre la Reubicación a México (junio 2022 ~ junio 2023)", que encuestó a más de 1,300 empresas con 100 o más empleados sobre "el incremento en la producción, ventas e inversión posterior a la pandemia del nuevo coronavirus y sus factores (expansión de la demanda, o el impacto de la reubicación de la base de producción)".

De acuerdo con los resultados del análisis de JETRO México⁵, el 35.8% de las empresas participantes en la cadena global, principalmente de la industria automotriz, percibe "el aumento de la producción, las ventas y la inversión debido al aumento de la demanda o la reubicación de bases", y con referencia a "los efectos positivos directamente atribuibles a la reubicación de bases", un 20% (18.2%) de las empresas perciben directamente el impacto del nearshoring.

Sobre la base de estos hallazgos, juzgamos que el "aumento en el número de participantes en la cadena de valor automotriz (10% o más)" que se muestra en el indicador-1 puede lograrse a través de la implementación continua de programas en cada estado para fortalecer la cadena de proveeduría automotriz, incluida la vinculación comercial mediante eventos de encuentro comercial.

Fortalecimiento de la competitividad de los proveedores mexicanos de autopartes

Con respecto al indicador-2, un total de 126 de las 138 empresas que participaron en actividades de asistencia en Kaizen en el piso de producción (de la 1ra a 5a etapa) en el quinquenio 2019-2023 recibieron asesoría sobre la mejora en el piso de producción y han trabajado en temas de mejora relacionados con la calidad (Q), el costo (C) y el tiempo de entrega (D). De estas 126 empresas, un total de 115 empresas (alrededor del 91%) han alcanzado las metas de los temas de mejora, y en la encuesta de impactos muchas de ellas comentaron que han "fortalecido sus sistemas de gestión de la producción en piso de producción" y "fortalecido su competitividad corporativa en términos de desarrollo de recursos humanos". Al mismo tiempo, muchas empresas se dan cuenta de la dificultad de desarrollar recursos humanos internos por su cuenta, por lo que existe una necesidad extremadamente alta de apoyo para la capacitación y las actividades de asesoría técnica en Kaizen

Reporte regional analítico de JETRO (Octubre, 2023)https://www.jetro.go.jp/biz/areareports/2023/00de21796c45ba7b.html

en el piso de producción para los proveedores de autopartes en cada estado. En este contexto, estimamos que es posible alcanzar el objetivo de "fortalecer la competitividad empresarial (\rightleftharpoons a un nivel que permite a las empresas ingresar a la cadena de valor automotriz)" indicado en el indicador-2 mediante la implementación continua del programa de fortalecimiento de la cadena de proveeduría automotriz.

6.2 Plan de Operación y Estructura de Implementación de la parte mexicana para lograr la meta superior

(1) Estructura de implementación

Al igual que durante el período de ejecución conjunta del Proyecto con Japón, la función de facilitador desempeñada por la Secretaría de Desarrollo Económico o el clúster automotriz de cada estado continuará, en principio, en el plan de ejecución aún después de finalizar el Proyecto. Por otro lado, en lo que respecta al papel de los expertos de JICA (especialmente los encargados de la capacitación y la asistencia en Kaizen en piso de producción), 47 entrenadores de Kaizen (equipos seleccionados en cada estado) formados en el Proyecto ocuparán el lugar de los expertos de JICA. Estos entrenadores de Kaizen trabajarán junto con la Secretaría de Desarrollo Económico o el CA de cada estado para implementar programas de fortalecimiento de la cadena de proveeduría bajo contrato o sistema de registro.

"Estructura de Implementación de Programas de Fortalecimiento de la Cadena de Proveeduría Automotriz"

<Estado de Aguascalientes>

◆ Facilitador : Secretaría de Desarrollo Económico, Ciencia y Tecnología

(SEDECyT)

◆ Entrenador de Kaizen : 16 miembros seleccionados por el estado (incluyendo miembros

pertenecientes a las empresas proveedoras de autopartes)

◆ Recursos vinculados : Grupo de Empresas Japonesas de Aguascalientes, A.C. (GEJA)

Universidad Tecnológica de Aguascalientes (UTA)

♦ Observadores : Nissan Mexicana, etc.

<Estado de Guanajuato>

◆ Facilitador : Secretaría de Desarrollo Económico Sustentable (SDES),

Clúster Automotriz de Guanajuato (CLAUGTO)

* Cabe mencionar que en enero de 2024, el Master Plan no estaba aprobado, esto implicaría que la estructura de implementación y el plan financiero se encuentran en un estado no claro.

◆ Entrenadores de Kaizen: 12 miembros seleccionados por el estado (incluyendo miembros pertenecientes a las empresas proveedoras de autopartes)

◆ Recursos vinculados : Planteles Celaya e Irapuato del CONALEP,

Instituto Estatal de Capacitación (IECA), etc.

◆ Observadores : Mazda México (MMVO), etc.

<Estado de Querétaro>

◆ Facilitador : Clúster Automotriz de Querétaro, Secretaría de Desarrollo

Sustentable (SEDESU)

◆ Entrenadores de Kaizen: 9 miembros seleccionados por el estado (incluyendo miembros

pertenecientes a las empresas proveedoras de autopartes)

◆ Recursos vinculados : Plantel San Juan del Río del CONALEP,

Universidad Autónoma de Querétaro,

Nissei México (Nissei School: Inyección de plásticos), etc.

<Estado de San Luis Potosí>

◆ Facilitador : Clúster Automotriz de San Luis Potosí,

Secretaría de Desarrollo Económico (SEDECO)

• Entrenadores de Kaizen: 10 miembros seleccionados por el estado (incluyendo miembros

pertenecientes a las empresas proveedoras de autopartes)

◆ Recursos vinculados : Universidad Politécnica de San Luis Potosí (UPSLP)

(2) Plan de implementación (Master Plan)

A lo largo del Proyecto, las medidas para fortalecer la cadena de proveeduría automotriz, centradas en la capacitación para las empresas y la asistencia en Kaizen en el piso de producción, se han repetido muchas veces, por lo tanto el método de implementación tomado en el Proyecto para llevar a cabo los procesos del aviso de convocatoria para hacer la selección de empresas participantes, la implementación de asistencia, la evaluación de actividades y el compartir resultados finales logrados serán adoptados casi en su forma original.

<Elementos claves del Master Plan>

① Realización de eventos de encuentros comerciales

Organizar y llevar a cabo los eventos de encuentros comerciales con el objetivo de fortalecer y expandir la cadena de proveeduría.

② Implementación de la capacitación para las empresas

Capacitación de conocimientos básicos de las técnicas de gestión en general que son necesarias para que los proveedores de autopartes realicen las actividades de Kaizen en el piso de producción

<Participantes objetivo>

Recursos humanos pertenecientes a las empresas proveedoras de autopartes quienes realicen actividades productivas y que sean esperados ser líderes en las actividades de Kaizen en sus propias empresas.

<Contenido y forma>

La capacitación estará compuesta de las siguientes 3 áreas de teorías (gestión de equipos/maquinarias, gestión de operación y gestión de calidad) y de las prácticas en simulación de producción. Capacitación intensiva de 3 días (8 horas x 3 días).

El número de participantes apropiado en una capacitación sería de unas 20 personas, por lo tanto, si se espera más número de participantes, es recomendable ejecutar la capacitación dividida en varios grupos y en diferentes fechas.

<Instructores de capacitación>

Los instructores serán Entrenadores de Kaizen (equipo seleccionado en cada estado), y según temas de capacitación, sería bueno formar una pareja (un capacitador de recursos externos y uno perteneciente a la empresa) de instructores para que puedan contestar a las preguntas que hacen los participantes sobre casos concretos del piso de producción.

③ Implementación de las actividades de asistencia de Kaizen en el piso de producción, orientadas a las empresas

Actividades de asesoría de Kaizen en el piso de producción, basadas en QC Story. Método de Kaizen, estructurado por 9 pasos.

<Empresas participantes>

Empresas que tengan el interés en desarrollar recursos humanos de sus empresas que liderarían las actividades internas de Kaizen y que cumpla con los requisitos que establece cada Estado como, por ejemplo, poder designar a un candidato al entrenador de Kaizen.

<Contenido y forma>

Se implementarán la capacitación dirigida a las empresas descrita en ②, así como las actividades de Kaizen en el piso de producción, para las empresas seleccionadas por los entrenadores de Kaizen. Para las actividades de Kaizen en el piso de producción, los entrenadores de Kaizen visitarán los pisos de producción de las empresas y desarrollarán las actividades junto con los candidatos a entrenadores de las empresas, de acuerdo con los nueve pasos de QC Story; formulación de un plan de actividades y selección del tema,

establecimiento del objetivo mediante el análisis factorial, consideración e implementación de contramedidas, comprobación de la efectividad de las contramedidas, entre otras.

<Instructores>

Entrenadores de Kaizen (equipos de selecciones estatales) apoyarán a las empresas en las actividades de Kaizen.

Los planes de actividades generales elaborados por los cuatro Estados se muestran en la Tabla-7.

Tabla-7: Esquema del Plan Maestro para 4 estados

Estado	Organización de Ejecución	Programa / Plan	Recursos Humanos	Recursos Financieros
Aguascalientes	- SEDECyT	Plan de Asistencia de Kaizen en	16 Asesores	Presupuesto de
		piso de producción (2024)	de Kaizen	SEDECyT
		(Programa para el Desarrollo de		(Direc. Desarrollo
		Proveedores Aguascalientes)		Industrial)
Guanajuato	- SDES	Plan de implementación de	12 Asesores	Presupuesto de SDES
	- CLAUGTO	Actividades de KAIZEN (2024)	de Kaizen	
	- IECA		(IECA)	
	- CONALEP		(Conalep)	
Querétaro	- SEDESU	Fortalecimiento de la Cadena de	9 Asesores	Presupuesto de
	- Clúster	Proveeduría Automotriz 2024	de Kaizen	SEDESU
	Automotriz	(Programa de Desarrollo de		Presupuesto autonomía
	de QRO	proveedores locales en QRO)		por Clúster Automotriz
				de QRO
San Luís Potosí	- CASLP	Plan de Asistencia Kaizen en	10 Asesores	Presupuesto autonomía
	- SEDECO	Piso de Producción 2024	de Kaizen	por CASLP
		(Programa para el "Desarrollo de		(SEDECO)
		Proveedores Locales en SLP)		

(3) Continuidad de aspectos financieros

En el caso del Estado de Aguascalientes, el presupuesto ya se ha asegurado y se ha decidido continuar con la capacitación en coordinación con el Grupo de Empresas Japonesas de Aguascalientes (GEJA).

En el Estado de Guanajuato también, se confirmó el firme compromiso por parte de la secretaría de desarrollo económico de seguir implementando el Master Plan al finalizar el Proyecto. Sobre todo en este Estado, se considera que es esencial ir incrementando el número de "entrenadores de Kaizen" quienes serán el actor principal para impulsar el plan de ejecución, por lo que se ha comprometido construir un sistema de colaboración que involucra no solo el clúster automotriz (Claugto) sino también el Instituto Estatal de Capacitación (IECA) y Colegio Nacional de Educación Profesional (CONALEP).

En el Estado de San Luís Potosí, se ha formulado un plan híbrido, que es una combinación de actividades soportadas por la "autonomía financiera" gestionadas principalmente por el clúster

automotriz y el uso del presupuesto para el desarrollo sectorial del gobierno estatal. Incluso en el seminario de presentación de los resultados que tuvo lugar a finales del año pasado, el gobierno estatal y el clúster automotriz presentaron el Master Plan para este año incluyendo las fechas de la convocatoria, por lo que se ha confirmado su firme compromiso.

En el Estado de Querétaro también, se ha apartado el presupuesto estatal y se ha formulado un plan de autonomía financiera principalmente por parte del clúster automotriz. Asimismo, el director general del clúster automotriz de Querétaro se refirió a la importancia de construir un modelo de negocio para asegurar la sostenibilidad y de desarrollar a recursos humanos locales capaces de ofrecer servicios que satisfagan a las empresas, y mencionó que:

En los cuatro Estados se han confirmado el diseño del mecanismo de acuerdo con el sistema que tiene cada Estado, así como un firme compromiso para asegurar el presupuesto, por lo que se considera que la sostenibilidad en el aspecto financiero es alta.

6.3 Propuestas para la etapa post-proyecto

Al concluir este proyecto, proponemos lo siguiente con la finalidad de que los resultados obtenidos se multipliquen, así como que las actividades en México se desarrollen de manera independiente:

- (1) Continuar el apoyo a las empresas locales principales de cada estado, para su crecimiento
 - Cada estado ha desarrollado el plan de ejecución (Master Plan), para fortalecer la cadena de suministro automotriz; dicho plan se está llevando a cabo en 2024. El plan tiene una misión común, con la finalidad de "desarrollar las empresas locales principales en el estado". Tras las actividades del Proyecto ejecutadas, se ha verificado el impacto significativo hacia las empresas -con la vision hacia el fortalecimiento del desarrollo humano, así como de la competitividad empresarial- con base en ello, esperamos que las actividades sigan continuando de manera garantizada, aun cuando este Proyecto haya concluido.
- (2) Elaborar cabalmente el "plan de entrega" a la siguiente administración ante los efectos de las elecciones federales y estatales
 - Para junio de 2024 están programadas las elecciones -a nivel federal presidencial y en el Estado de Guanajuato- se estiman algunos impactos por ellas, tales como la veda electoral y los cambios de personales. Para garantizar la ejecución del plan de este año -sin que dichos impactos lo interrumpan- esperamos que el proceso de continuación se garantice, a través de los documentos como el "plan de entrega" y otros, para la nueva administración que tome el cargo en septiembre, posterior a dichas elecciones.

Proponemos que la coordinación y la colaboración entre los cuatro estados y las siete instituciones -las mismas hasta la fecha ejecutadas por los expertos japoneses- sean encargadas por los personales de ventana de cada institución, posterior a la conclusión del Proyecto. Como resultado obtenido durante el Proyecto, se llevó a cabo la presentación de actividades realizadas dentro de cada estado. Además, se han venido realizadas las actividades interestatales, tales como la visita a MMVO y la Premiación Kaizen en 2022 y 2023. Por ello, deseamos -a través de los seminarios de difusión de los resultados, de las actividades sobre el fortalecimiento de la cadena de suministro automotriz- que sean compartidos (por lo menos anualmente) los resultados de actividades, así como los casos ejemplares, entre las siete instituciones de los cuatro estados y JICA México, de manera efectiva, para que la región Bajío aporte mayor contribución a la industria automotriz.

(3) Aprovechar la experiencia adquirida en cada estado y fortalecer la coordinación interestatal

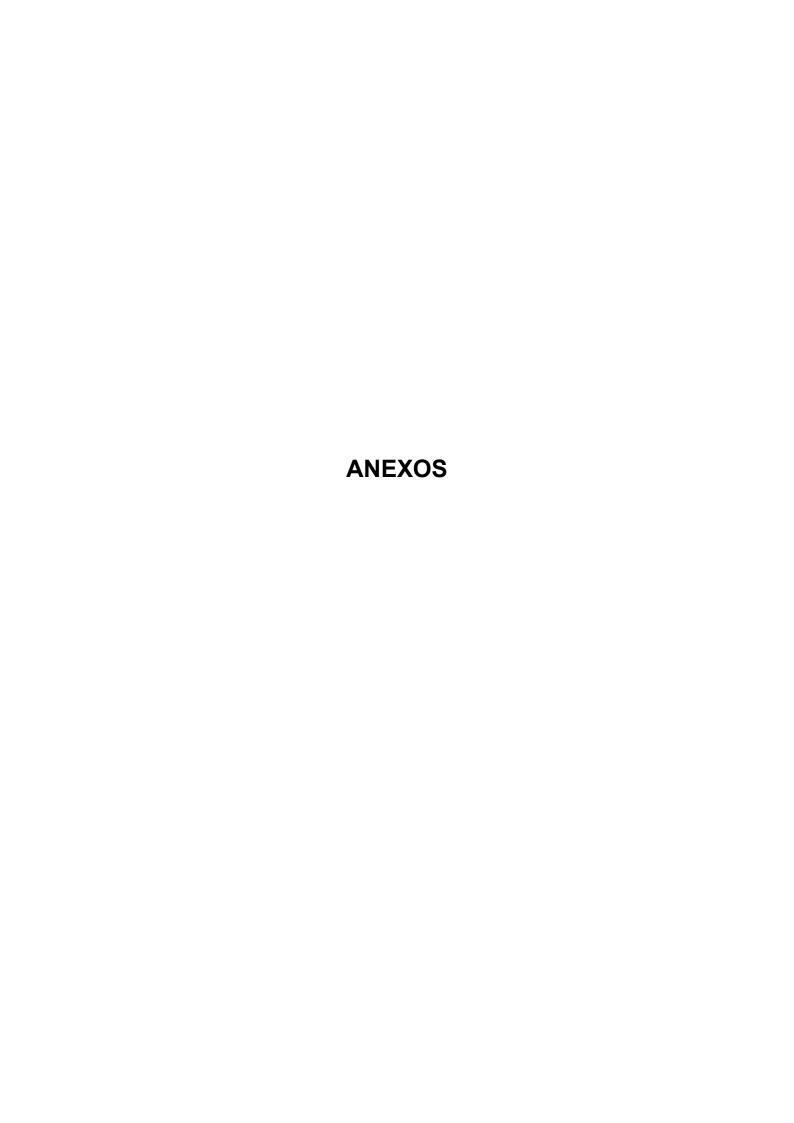
(4) Colaboración y nuevo desarrollo de los "entrenadores de Kaizen estatales", para cultivar la "mentalidad hacia las mejoras"

Las empresas que participaron en las actividades Kaizen en el piso de producción durante el Proyecto -basadas en QC Story- evaluaron los beneficios obtenidos como el conocimiento y las habilidades, además de la comunicación lógica y la mejora en la capacidad para analizar problemas, lo cual "desarrolló la mentalidad hacia las mejoras". Cabe resaltar que a las empresas japonesas les importa dicha mentalidad; estimamos -al colocarla como el centro conceptual del programa, para apoyar a la cadena de suministro de cada estado- que la región Bajío tendrá mayor competitividad. Debido a ello, esperamos que cada estado siga colaborando cada año con sus entrenadores Kaizen -encargados de capacitaciones técnicas- además de desarrollar y contar con los nuevos candidatos a ser entrenadores.

6.4 Plan de Monitoreo desde el final del Proyecto hasta la Evaluación posterior

Tras la finalización del Proyecto conjunto con Japón, el período para realizar las actividades para alcanzar la Meta Superior es de abril de 2024 a marzo de 2027 (tres años). Durante este período, la parte mexicana se compromete a continuar sus actividades para alcanzar los indicadores de la Meta Superior del Proyecto arriba mencionada, y a monitorear el avance de los principales indicadores de la Meta aprovechando las oportunidades para confirmar los resultados del plan de implementación cada año (reuniones para presentar resultados y evaluación final).

Para tal efecto, la Secretarías de Desarrollo Económico y los CA de los estados participantes, como propietarios del proyecto, deberán celebrar al menos una reunión anual con la Oficina de JICA México para informar y explicar las actividades y avances directamente relacionados con los indicadores de la Meta Superior.



Anexo 1. PDM (Project Design Matix) (de la versión 1 a la versión 3.1)

(1) Versión 1.0

Project Title : The Project for Automotive Cluster Promotion Implementing Agency : 4 State Governments, 3 Automotive Clusters in the Tarc	get States and ProMexico		Version 0 Dated May 26, 2017
Target Group : 4 State Governments, 3 Automotive Clusters and Mexic	an Auto Parts Suppliers (Tier2) in the Project Sites		Version 1.0 (draft)
Period of Project : 4th June, 2018 – 3rd June, 2023 (5 Years) Project Sites : All states with special focus on Aguascalientes State, G	Suanajuato State, Querétaro State and San Luis Potosí State	<u> </u>	Dated November 30, 2018
Narrative Summary	Objectively Verifiable Indicators	Means of Verification	Important Assumption
Overall Goal Participation of Mexican Auto Parts Suppliers in automotive value chain is increased in the target states.	More than XX Mexican Auto Parts Suppliers start or expand their business related to the automotive value chain in the target states. OEM and Tier-1 Automotive Suppliers in the target states increase the number of local supplier with which they do business and the amount of local procurement (For example, more than fifty (50) percent of those surveyed response that they increased them).	Questionnaire survey to Mexican Auto Parts Suppliers of the target states Questionnaire survey to OEM and Tier-1 Automotive Suppliers in the target states	Policy on development of automotive industry in the target states is not drastically changed.
Project Purpose Supporting systems to promote the participation of Mexican Auto Parts Suppliers (Tier-2) in the value chain of Japanese Automobile by State governments (SGs) and Automotive Clusters (ACs) are strengthened in the target states.	More than XX enterprises targeted for business matching and technical training provided by the Project start and expand business with Japanese Tier-1 Automotive Suppliers (including the enterprises which start business negotiations with Japanese Tier-1 Automotive Suppliers). More than XX Japanese Tier-1 Automotive Suppliers in the target states appreciate the business matching activities and the support to develop Mexican Auto Parts Suppliers by SGs and ACs. Systems of SGs and ACs to continuously provide the business matching service aimed at Japanese Tier-1 Automotive Suppliers and technical training service to Mexican Auto Parts Suppliers are established. XX of the beneficiary Mexican Tier 2 Auto Parts Suppliers maintain or become member of ACs of the	Interview survey to targeted Mexican enterprises Questionnaire survey to OEM and Tier-1 Automotive Suppliers in the target states Interview survey to SGs and ACs of the target states Interview survey to SGs and ACs of the target states	Japanese OEM and Tier-1 Automotive Suppliers continue collaborative activities with the Project on increasing local procurement. Business environment of automotive industry in Mexico including North American Free Trade Agreement (NAFTA) is not drastically changed
SGs and ACs of target states and ProMexico expand activities to provide Mexican Auto Parts Suppliers with the opportunities for business matching with the value chain of Japanese Automobile.	target states or similar entities. 1-1. SGs, ACs and ProMexico identify Mexican Auto Parts Suppliers that have a potential to come into the value chain of Japanese Automobile and conduct the survey on the needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement on a regular basis. 1-2. SGs, ACs and ProMexico organize events for business matching more than XX times a year. 1-3. XX % of Japanese OEM, Tier-1 and Mexican Tier 2	Interview survey to SGs, ACs of the target states and ProMexico Interview survey to SGs, ACs of the target states and ProMexico Questionnaire survey to Japanese OEM, Tier-1 and Mexican Tier-2 Automotive	Mexican counterparts remain in their organizations. Most of Mexican trainers developed through the Project continue OJT.
SGs and ACs of target states enhance their capacity to develop Mexican Tier-2 Auto Parts Suppliers.	Auto Parts Suppliers that utilized the business matching service provided by SGs, ACs and ProMexico find the service to be satisfactory. 2-1. XX % of trained enterprises achieve their target regarding Quality, Cost and Delivery (QCD). 2-2. More than XX local human resources who can provide technical guidance to Mexican Tier-2 Auto Parts Suppliers are developed. 2-3. More than XX % of Mexican Tier-2 Auto Parts Suppliers that received technical guidance from the	Interview survey to trained Mexican enterprises Project progress/completion reports Interview survey to Mexican enterprises that received technical guidance from the	
Training systems of SGs and ACs for Mexican Auto Parts Suppliers are strengthened in the target states.	trained trainers are satisfied with their guidance (More than 3.5 in five (5) -grade evaluation). 3-1. Short-term trainings/open workshops are implemented more than XX times a year. 3-2. More than XX Mexican Auto Parts Suppliers participate in short-term trainings/ open workshops. 3-3. XX % of Mexican Auto Parts Suppliers that participate in	trained trainers Project progress/completion reports Project progress/completion reports Questionnaire survey to Mexican Auto Parts Suppliers that participate in short-	
Measures and programs to promote the development of Mexican Tier-2 Auto Parts Suppliers are proposed in the target states.	short-term trainings/ open workshops get satisfaction (More than 3.5 in five (5) -grade evaluation). 4-1. "The Automotive Value chain Discussion Meeting" is implemented at least XX times. 4-2. Each target State and ProMexico prepare at least one program or measure to promote the development of Mexican Tier-2 Auto Parts Suppliers.	term trainings/open workshops Project progress/completion reports Interview survey to each target State and ProMexico	

Activities	Inputs		Important Assumption
0-1. Implementing framework of the Project is established.	The Japanese Side	The Mexican Side	
0-2. Baseline survey is implemented to grasp the actual situation of Mexican Auto Parts	Japanese experts	Assignment of Counterpart	
Suppliers and local procurement by Japanese Tier-1 Automotive Suppliers.	[Long term Experts]	(1) Aguascalientes State	
0-3. Policies and strategies of each target state to promote the automotive industry	- Chief Adviser	(a) Project Director: Undersecretary	
are reviewed and an action plan of the Project is prepared.	- Project Coordinator	of Investment and Foreign Trade	
	[Short term Experts]		
1-1. SGs and ACs conduct the survey on the needs of Japanese OEM and Tier-1	Ouglity and Productivity improvement of T-t-1	(b) Project Manager: Director of Industry Attention	
Automotive Suppliers for local procurement.	Quality and Productivity improvement of Total Quality Management, Total Productive		
1-2. SGs, ACs and ProMexico select Mexican Auto Parts Suppliers that have a	Quality Management, Total Productive	(c) Assigned Personnel:	
potential to come into the value chain of Japanese Automobile.	Maintenance, Lean Production System	Directorate of Industry Attention	
1-3. SGs, ACs and ProMexico make business matching of target Mexican Tier 2 Auto	 Production technology of Stamping, Plastic 		
Parts Suppliers with Japanese OEM and Tier-1 Automotive Suppliers according	Injection, Forging, Machining, Surface Treatment	(2) Guanajuato State	
to their needs.	and Tooling of die and mold	(a) Project Director: Undersecretary	
1-4. SGs, ACs and ProMexico organize factory tours to Mexican Tier-2 Auto Parts	- Business Development	of SME's development	
Suppliers targeted for Japanese OEM and Tier-1 Automotive Suppliers.		(b) Project Manager: Director	
1-5. SGs and ACs review the results of business matching, providing guidance to	Knowledge Co-Creation Program (Training in Japan	General of Guanajuato	
Mexican Tier-2 Auto Parts Suppliers and consider the provision of training to	and the third country)	Automotive Cluster	
them as needed basis.	17	(c) Assigned Personnel:	
1-6. SGs, ACs and ProMexico update the Automotive Supplier Database reflecting	3. Equipment and machinery necessary to implement the	Directorate of Automotive	
the latest information of Mexican Tier-2 Auto Parts Suppliers.	project activities	Sector and Auto parts	
1-7. SGs, ACs and ProMexico provide the information about Mexican Tier-2 Auto	project detailed	Ocolor and Auto parts	
Parts Suppliers that have a potential to come into the Value chain of Japanese	Part of local operation cost	(3) Querétaro State	
	T. 1 art of local operation cost	(a) Project Director: Undersecretary	
Automobile with Japanese OEM and Tier-1 Automotive Suppliers on a regular		of Economic Development	
basis.			
1-8. SGs, ACs and ProMexico organize expositions and business matching events		(b) Project Manager: Director	
promoting the participation of Japanese OEM and Tier-1 Automotive Suppliers.		General of Queretaro	
1-9. SGs and ACs summarize the experiences of business matching and share them		Automotive Cluster	
with other states.		(c) Assigned Personnel:	
2-1. SGs and ACs design the system to continuously develop Mexican Tier-2 Auto		Directorate of Business	
Parts Suppliers.		Development	
2-2. SGs and ACs select enterprises targeted for training among the ones that have			
a potential to come into the Value chain of Japanese Automobile.		(4) San Luis Potosí State	
2-3. SGs and ACs prepare the plan of "Tier2 KAIZEN Activity *".		(a) Project Director: Director	
2-4. SGs and ACs select Mexican trainers.		General of Development and	
2-5. SGs and ACs prepare the plan of Mexican trainer development.		Industrial Promotion	
2-6. SGs and AGs prepare the plan of Mexican trainer development. 2-6. SGs and AGs implement the "Tier2 KAIZEN Activity" (On-the-job-training).		(b) Project Manager: Director	
2-7. SGs and AGs implement the Their KAIZEN Activity" (Orthological Inline).		General of San Luis Potosi	
practices.		Automotive Cluster	
		(c) Assigned Personnel:	
2-8. SGs and ACs evaluate the capacity of Mexican trainers and grant recognition as		Directorate of Development and	
a trainer for Automotive Parts Supplier.		Industrial Promotion	
2-9. SGs and ACs summarize the experiences of activities for "Tier2 KAIZEN Activity"		industrial Promotion	
and share them with other states.		(5) De-Marria	
 * "Tier2 KAIZEN Activity" denotes an advisory on management and production 		(5) ProMexico	
improvement to the nominated high potential Mexican Auto Parts Suppliers.		(a) Project Director: Executive	
3-1. SGs and ACs prepare the training plan for Mexican Auto Parts Suppliers.		Directorate of International	Pre-Conditions
3-2. SGs and ACs implement the training for 5S and KAIZEN.		Business Models	Japanese Original
3-3. SGs and ACs implement the training for quality improvement and product		(b) Project Manager: Director of	Equipment
development.		International Cooperation	Manufacturers(OEM) and
3-4. SGs and ACs implement the training for business manners and practices.		(c) Assignment of Personnel:	Tier-1 Automotive Suppliers
3-5. SGs and ACs organize the seminars to disseminate best practices of Mexican		Executive Directorate for	have a policy to expand
Auto Parts Suppliers including the achievements of KAIZEN Group.		Sector "B" represented by the	local procurement.
3-6. SGs and ACs regularly review the project activities and consider the new issues		Director of Auto Parts	There are Mexican
to be addressed.		Industries	enterprises that can
4-1. SGs, ACs and ProMexico plan to organize "the Automotive Value chain		Coordinator of Global Chain	potentially come into the
		Operation Operation	value chain of Japanese
Discussion Meeting", through which Japanese OEM, Tier-1 Automotive		Director of ProMexico's Office	
Suppliers and Mexican Tier-2 Auto Parts Suppliers see each other and have an		in Aguascalientes	Automobile.
open dialogue.		Director of ProMexico's Office	SGs and ACs of each target
4-2. SGs, ACs and ProMexico organize "the Automotive Value chain Discussion Meeting"			state provide human
with participation of Japanese OEM, Tier-1 Automotive Suppliers and Mexican Tier-2		in Guanajuato	resources, budget and office
Auto Parts Suppliers on a regular basis, and identify necessary measures to support		Director of ProMexico's Office	space for Japanese experts
business development of Mexican Tier-2 Auto Parts Suppliers.		in Queretaro	necessary to implement the
4-3. SGs, ACs and ProMexico review the project activities and identify policies and		Director of ProMexico's Office	Project.
measures to support business development of Mexican Tier-2 Auto Parts Suppliers.		in San Luis Potosi	
4-4. SGs, ACs and ProMexico draft the support programs and/or measures to			
promote the development of Mexican Tier-2 Auto Parts Suppliers.		Office space and equipment for	
4-5. SGs, ACs and ProMexico submit the above mentioned measures and programs		Japanese Experts	
to the concerned authorities.		Facility necessary to organize meetings,	
to the concerned authorities.		trainings and seminars	
		Budget necessary to implement the	
		project activities	
	I .	project activities	1

(2) Versión 2.0

Project Title : The Project for Automotive Cluster Promotion
Implementing Agency : 4 State Governments, 3 Automotive Clusters in the Target States

Target Group : 4 State Governments, 3 Automotive Clusters and Mexican Auto Parts Suppliers (Tier2) in the Project Sites

Period of Project : 4th June 2018 – 3rd June 2023 (5 Years)

Version 1.0 (Draft)
Dated November 30, 2018
Version 2.0
Dated June 30, 2019

Project Sites : All states with special focus on Aguascalientes State, (uanajuato S			•
Narrative Summary		Objectively Verifiable Indicators	Means of Verification	Important Assumption
Overall Goal Participation of Mexican Auto Parts Suppliers in automotive value chain is increased in the target states.	expar value	than XX Mexican Auto Parts Suppliers start or not their business related to the automotive or chain in the target states.	 Questionnaire survey to Mexican Auto Parts Suppliers of the target states Questionnaire survey to OEM and Tier-1 Automotive Suppliers in the target states 	Policy on development of automotive industry in the target states is not drastically changed.
	states they d (For e surve	s increase the number of local supplier with which do business and the amount of local procurement example, more than fifty (50) percent of those wed response that they increased them).	., 0	3
Project Purpose Supporting systems to promote the participation of Mexican Auto Parts Suppliers (Tier-2) in the value chain of Japanese Automobile by State governments (SGs) and Automotive Clusters (ACs) are strengthened in the target states.	match Projec Tier-1 enterp	than XX enterprises targeted for business hing and technical training provided by the ct start and expand business with Japanese I Automotive Suppliers (including the prises which start business negotiations with	Interview survey to targeted Mexican enterprises	Japanese OEM and Tier-1 Automotive Suppliers continue collaborative activities with the Project on increasing local
	More in the	nese Tier-1 Automotive Suppliers). than XX Japanese Tier-1 Automotive Suppliers target states appreciate the business matching	 Questionnaire survey to OEM and Tier-1 Automotive Suppliers in the target states 	procurement. 2. Business environment of automotive industry in
	Parts 3. Syste	ties and the support to develop Mexican Auto Suppliers by SGs and ACs. ems of SGs and ACs to continuously provide the less matching service aimed at Japanese Tier-1	 Interview survey to SGs and ACs of the target states 	Mexico including North American Free Trade Agreement (NAFTA) is not
	Auton to Me 4. XX of Suppl	motive Suppliers and technical training service exican Auto Parts Suppliers are established. f the beneficiary Mexican Tier 2 Auto Parts lilers maintain or become member of ACs of the	· Interview survey to SGs and ACs of the target states	drastically changed
Outputs SGs and ACs of target states expand activities to provide Mexican Auto Parts Suppliers with the opportunities for business matching with the value chain of Japanese Automobile.	1-1. SGs a that h Japar needs	t states or similar entities. and ACs identify Mexican Auto Parts Suppliers have a potential to come into the value chain of hese Automobile and conduct the survey on the s of Japanese OEM and Tier-1 Automotive liers for local procurement on a regular basis.	Interview survey to SGs, ACs of the target states	Mexican counterparts remain in their organizations. Most of Mexican trainers developed through the
	1-2. SGs a more 1-3. XX % Auto I match	and ACs organize events for business matching than XX times a year. of Japanese OEM, Tier-1 and Mexican Tier 2 Parts Suppliers that utilized the business hing service provided by SGs and ACs find the ce to be satisfactory.	Interview survey to SGs, ACs of the target states Questionnaire survey to Japanese OEM, Tier-1 and Mexican Tier-2 Automotive Suppliers	Project continue OJT.
SGs and ACs of target states enhance their capacity to develop Mexican Tier-2 Auto Parts Suppliers.	2-1. XX % regard 2-2. More	of trained enterprises achieve their target ding Quality, Cost and Delivery (QCD). than XX local human resources who can	Interview survey to trained Mexican enterprises	
	Parts 2-3. More Suppl	de technical guidance to Mexican Tier-2 Auto Suppliers are developed. than XX % of Mexican Tier-2 Auto Parts liers that received technical guidance from the	 Project progress/completion reports Interview survey to Mexican enterprises that received technical guidance from the 	
Training systems of SGs and ACs for Mexican Auto Parts Suppliers are strengthened in the target states.	traine (More 3-1. Short-	ed trainers are satisfied with their guidance e than 3.5 in five (5) -grade evaluation). -term trainings/open workshops are implemented than XX times a year	trained trainers Project progress/completion reports Project progress/completion reports	
	partic 3-3. XX % short-	than XX Mexican Auto Parts Suppliers ipate in short-term trainings/ open workshops. of Mexican Auto Parts Suppliers that participate in term trainings/ open workshops get satisfaction	Questionnaire survey to Mexican Auto Parts Suppliers that participate in short- term trainings/open workshops	
Measures and programs to promote the development of Mexican Tier-2 Auto Parts Suppliers are proposed in the target states.	4-1. "The A	than 3.5 in five (5) -grade evaluation). Automotive Value chain Discussion Meeting" is mented at least XX times. target State prepare at least one program or sure to promote the development of Mexican	Project progress/completion reports Interview survey to each target State	
	meas Tier-2	sure to promote the development of Mexican 2 Auto Parts Suppliers.		

16. Imprementing framework of the Project is established. Sealing is surprise y improvement or great the activation of Moscan Auto Scapping. Sealing is surprise to great the surprise of th	Activities	Inputs		Important Assumption
10.2 Beaching curvoy is implemented to grow the actual situation of Medician Auto- Supplemental Counterpart (1) 2. Policies and detailed growth of the supplemental Counterpart (1) 2. Policies and detailed growth of the supplemental Counterpart (1) 2. Sign and Act a make business marching of target Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a make business marching of target Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a make business marching of target Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a make business marching of target Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a consume factory tours to Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a consumer factory tours to Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a consumer factory tours to Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a consumer factory tours to Mexican Titor 2 Auto Parts Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplemental Counterpart (1) 2. Sign and Act a surface Supplement			The Mexican Side	
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	4-5. SGs and ACs submit the above mentioned measures and programs to the			
	concerned authorities.			

(3) Versión 3.0

Project Title : The Project for Automotive Cluster Promotion

Implementing Agency : 4 State Governments, 3 Automotive Clusters in the Target States

Target Group : 4 State Governments, 3 Automotive Clusters and Mexican Auto Parts Suppliers in the Project Sites

Period of Project : 4th June 2018 – 3rd June 2023 (5 Years)

Project Sites : All states with special focus on Aguascalientes State, Guanajuato State, Querétaro State and San Luis Potosi State

Dated June 30, 2019 **Project Sites** : All states with special focus on Aquascalientes State, Guanajuato State, Querétaro State and San Luis Potosí State Version 3.0 Dated February 4, 2021 Objectively Verifiable Indicators Means of Verification Important Assumption Narrative Summary Overall Goal Policy on development of More than XX Mexican Auto Parts Suppliers start or Questionnaire survey to Mexican Auto Participation of Mexican Auto Parts Suppliers in automotive supply chain is increased expand their business in the automotive supply chain Parts Suppliers or annual report of SGs automotive industry in the in the target states. in the target states. and ACs of the target states target states is not drastically More than XX Mexican Auto Parts Suppliers gain a Questionnaire survey to OEM and Tier-1 changed. certain level of competitiveness to initiate business Automotive Suppliers annual report of SGs negotiations in the automotive supply chain in the and ACs of the target states target states. Project Purpose A supporting system for implementing the Master Plan Interview survey to SGs and ACs of the 1. Japanese OEM and Tier-1 Supporting systems to promote the participation of Mexican Auto Parts Suppliers in is authorized by the target states governments and **Automotive Suppliers** target states the Japanese automotive supply chain by State governments (SGs) and Automotive automotive cluster associations (Personnel, budget, continue collaborative Clusters (ACs) are strengthened in the target states. activities with the Project on plan, results) More than XX companies use/utilize the supporting Project progress/completion reports. increasing business with system. local Suppliers XX% of companies using the supporting system. Questionnaire survey to OEM and Tier-1 desire to continue using the system (= effectiveness of Automotive Suppliers End-line survey to the supporting system) targeted Mexican Automotive Suppliers 2. 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SGs and ACs identify Mexican Auto Parts Suppliers that have a potential to come into the Japanese SGs and ACs of target states expand activities to provide Mexican Auto Parts Interview survey to SGs, ACs of the target Mexican counterparts Suppliers with the opportunities for business matching with the Japanese states remain in their automotive supply chain. automotive supply chain and conduct the survey on organizations. the needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement on a regular basis. 1-2. SGs and ACs organize events for business matching Project progress / completion reports / more than XX times a year. Annual report of SGs, ACs of the target 1-3. XX % of Japanese OEM, Tier-1 and Mexican Auto End-line survey to Japanese OEM, Tier-1 Parts Suppliers that utilized the business matching service provided by SGs and ACs find the service to and Mexican Tier-2 Automotive Suppliers be satisfactory. SGs and ACs of target states enhance their capacity to promote the KAIZEN 2-1, XX % of trained enterprises achieve their target Project progress/completion reports 2. Most of Mexican Kaizen activities of Mexican Auto Parts Suppliers. regarding Quality, Cost and Delivery (QCD). trainers developed through 2-2. More than XX local human resources who can provide Project progress/completion reports the Project remain to technical guidance to Mexican Auto Parts Suppliers register in the target states. are developed. 2-3. More than XX % of Mexican Auto Parts Suppliers that End-line survey to trained Mexican received technical guidance from the trained trainers Automotive Suppliers. are satisfied with their quidance (More than 3.5 in five (5) -grade evaluation). 2-4. More than XX of Mexican Kaizen Trainers are Project progress/completion reports registered in target states. Short-term trainings/open workshops are implemented 3. 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Version 1.0 (Draft)

Version 2.0

Dated November 30, 2018

Fig. Implementing framework of the Project is collabilished. Mexican Auto-Parts Suppliers and local procurement by Apparesse Ther 1 Advancables suppliers.	Acti	vities	Inputs		Important Assumption
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					in Mexico and Japan.

(4) Versión 3.1

 Project Title
 : The Project for Automotive Cluster Promotion

 Implementing Agency
 : 4 State Governments, 3 Automotive Clusters in the Target States

 Target Group
 : 4 State Governments, 3 Automotive Clusters and Mexican Auto Parts Suppliers in the Project Sites

 Period of Project
 : 4th June 2018 – 3rd June 2023 (5 Years)

 Project Sites
 : All states with special focus on Aquascalientes State, Guanajuato State, Querétaro State and San Luis Potosí State

Dated November 09, 2021 Narrative Summary **Objectively Verifiable Indicators** Means of Verification Important Assumption Overall Goal More than 10% Mexican Auto Parts Suppliers start or Questionnaire survey to Mexican Auto Policy on development of Participation of Mexican Auto Parts Suppliers in automotive supply chain is increased expand their business in the automotive supply chain Parts Suppliers or annual report of SGs automotive industry in the and ACs of the target states in the target states. in the target states. target states is not drastically More than 10% Mexican Auto Parts Suppliers gain a Questionnaire survey to OEM and Tier-1 changed. certain level of competitiveness to initiate business Automotive Suppliers annual report of SGs negotiations in the automotive supply chain in the and ACs of the target states; Business environment of automotive industry in the target states. Signed Contracts world is not changed drastically by covid-19, USMCIA. Project Purpose A supporting system for implementing the Master Plan Interview survey to SGs and ACs of the 1. Japanese OEM and Tier-1 Supporting systems to promote the participation of Mexican Auto Parts Suppliers in is authorized among the target states governments Automotive Suppliers target states the Japanese automotive supply chain by State governments (SGs) and Automotive and automotive cluster associations (Personnel. continue collaborative Clusters (ACs) are strengthened in the target states. budget, plan, results) activities with the Project on Project progress/completion reports. More than 40 companies use/utilize the supporting increasing business with system for all states. local Suppliers More than 40% of companies using the supporting Questionnaire survey to OEM and Tier-1 Automotive Suppliers End-line survey to system, desire to continue using the system (= effectiveness of the supporting system) targeted Mexican Automotive Suppliers 2. Business environment of More than 12 of the beneficiary Mexican Auto Parts End-line survey to targeted Mexican automotive industry in the Suppliers maintain or become members of ACs of the Automotive Suppliers world is not changed target states or similar entities. Membership drastically by covid-19, Competitiveness of Mexican Auto Parts Suppliers is USMCIA. increased by applying the supporting system. End-line survey to targeted Mexican (i.e., evaluation from the buyer's point of view is Automotive Suppliers Outputs 1-1. SGs and ACs identify Mexican Auto Parts Suppliers that SGs and ACs of target states expand activities to provide Mexican Auto Parts Interview survey to SGs, ACs of the target Mexican counterparts Suppliers with the opportunities for business matching with the Japanese have a potential to come into the Japanese automotive remain in their automotive supply chain. supply chain and conduct more than 4 surveys on the organizations. needs of Japanese OEM and Tier-1 Automotive Suppliers for local procurement on a regular basis. 1-2. SGs and ACs organize events for business matching Project progress / completion reports / more than 4 times a year. Annual report of SGs, ACs of the target 1-3. More than 75 % of Japanese OEM. Tier-1 and Mexican Auto Parts Suppliers that utilized the End-line survey to Japanese OEM, Tier-1 business matching service provided by SGs and ACs and Mexican Tier-2 Automotive Suppliers find the service to be satisfactory. 2-1. More than 75 % of trained enterprises achieve their 2. Most of Mexican Kaizen SGs and ACs of target states enhance their capacity to promote the KAIZEN Project progress/completion reports target regarding Quality, Cost and Delivery (QCD). trainers developed through activities of Mexican Auto Parts Suppliers. 2-2. More than 60 local human resources who can provide Project progress/completion reports the Project remain to technical guidance to Mexican Auto Parts Suppliers register in the target states. are developed in the target states 2-3. More than 75 % of Mexican Auto Parts Suppliers that End-line survey to trained Mexican received technical guidance from the trained trainers Automotive Suppliers. are satisfied with their guidance (More than 3.5 in five (5) -grade evaluation). 2-4. More than 40 of Mexican Kaizen Trainers are Project progress/completion reports registered in the target states. Training systems of SGs and ACs for Mexican Auto Parts Suppliers are Short-term trainings/open workshops are implemented Project progress/completion reports 3. Policy and Strategy to promote the automotive strengthened in the target states. more than 15 times a year. 3-2. 200 Mexican Auto Parts Suppliers participate in short-Project progress/completion reports industry in the target states term trainings/ open workshops. are not changed drastically. More than 75% of Mexican Auto Parts Suppliers that Questionnaire survey to Mexican Auto participate in short-term trainings/ open workshops get Parts Suppliers that participate in shortsatisfaction (More than 3.5 in five (5) -grade evaluation). term trainings/open workshops Measures and programs (Master Plan) to promote the development of Mexican 40 Mexican potential resources are listed by SGs and Project progress / completion reports Auto Parts Suppliers are improved in the target states. Interview survey to each target State 4-2. Measures and programs (Master Plan) are developed.

Version 1.0 (Draft)

Version 2.0 Dated June 30, 2019

Version 3.1

Dated November 30, 2018

Version 3.0 Dated February 4, 2021

Act	vities	Inputs		Important Assumption
0-1.	Implementing framework of the Project is established.	The Japanese Side	The Mexican Side	
0-2.	Baseline survey is implemented to grasp the actual situation of Mexican Auto	Japanese experts	Assignment of Counterpart	
U	Parts Suppliers and local procurement by Japanese Tier-1 Automotive Suppliers.	[Short term Experts]	(1) Aguascalientes State	
0-3	Policies and strategies of each target state to promote the automotive industry	- Team leader.	(a) Project Director: Undersecretary	
0-0.	are reviewed and an action plan of the Project is prepared.	Quality and Productivity improvement of Total	of Investment and Foreign Trade	
1 1	SGs and ACs conduct the survey on the needs of Japanese OEM and Tier-1	Quality Management, Total Productive	(b) Project Manager: Director of	
1-1.		Maintenance, Lean Production System	Industry Attention	
4.0	Automotive Suppliers for local procurement.	Maintenance, Lean Production System		
1-2.	SGs and ACs identify Mexican Auto Parts Suppliers that have a potential to	- Production technology of Stamping, Plastic	(c) Assigned Personnel: Directorate	
	come into the Japanese Automotive supply chain.	Injection, Forging, Machining, etc.	of Industry Attention	
1-3.	SGs and ACs prepare the plan to make business matching of target Mexican	- Business Development	(2) Guanajuato State	
	Tier-2 Auto Parts Suppliers with Japanese OEM and Tier-1 Automotive Suppliers	Knowledge Co-Creation Program (Training in Japan	(a) Project Director: Undersecretary	
	according to their needs.	and the third country)	of SME's development	
1-4.	SGs and ACs organize the exposition and make business matching of Mexican	Equipment and machinery necessary to implement the	(b) Project Manager: Director	
	Tier-2 Auto Parts Suppliers targeted for Japanese OEM and Tier-1 Automotive	project activities	General of Guanajuato	
	Suppliers.	Part of local operation cost	Automotive Cluster	
1-5.	SGs and ACs review the results of business matching, providing guidance to	·	(c) Assigned Personnel: Directorate	
	Mexican Tier-2 Auto Parts Suppliers and consider the provision of training to		of Automotive Sector and Auto	
	them as needed basis.		parts	
1_6	SGs and ACs update the Automotive Supplier Database reflecting the latest		(3) Querétaro State	
1-0.	information of Mexican Tier-2 Auto Parts Suppliers.		(a) Project Director: Undersecretary	
1_7	SGs and ACs provide the information about Mexican Tier-2 Auto Parts Suppliers		of Economic Development	
'-'.	that have a potential to come into the automotive supply chain with Japanese		(b) Project Manager: Director	
			General of Queretaro Automotive	
1.0	OEM and Tier-1 Automotive Suppliers on a regular basis.		Cluster	
1-8.	SGs and ACs summarize the experiences of business matching and share them			
	with other target states.		(c) Assigned Personnel: Directorate	
2-1.	SGs and ACs identify the needs of Japanese OEM and Tier-1 to develop		of Business Development	
	Mexican Auto Parts Suppliers.		(4) San Luis Potosí State	
2-2.	SGs and ACs select enterprises targeted for training among the ones that have a		(a) Project Director: Director	
	potential to come into the Japanese automotive supply chain.		General of Development and	
2-3.	SGs and ACs prepare the Implementation plan of "Tier-2 KAIZEN Activity *".		Industrial Promotion	
2-4.	SGs and ACs identify and select "Candidates of Mexican KAIZEN trainers".		(b) Project Manager: Director	
2-5.	SGs and ACs prepare the training plan for "Candidates of Mexican KAIZEN		General of San Luis Potosi	
	trainers".		Automotive Cluster	
2-6.	SGs and ACs implement the "Tier-2 KAIZEN Activity" (On-the-job-training).		(c) Assigned Personnel: Directorate	
2-7.	SGs and ACs assess the results of "Tier-2 KAIZEN Activity" and report best		of Development and Industrial	
	practices.		Promotion	
2-8.	SGs and ACs evaluate the capacity of "Candidates of Mexican KAIZEN trainers"		2. Office space and equipment for Japanese	
	and register as Mexican KAIZEN trainers.		Experts	
2-9	SGs and ACs organize the seminar to disseminate best practice of KAIZEN		3. Facility necessary to organize meetings,	
0.	Activities of automotive Suppliers.		trainings and seminars	
2-10	SGs and ACs summarize the experiences of activities for "Tier-2 KAIZEN		Budget necessary to implement the	
	Activity" and share them with other target states.		project activities	
2-11	. SGs and ACs develop the model plan to implement Tier-2 KAIZEN Activities.		project dournes	
2-11	* "Tier-2 KAIZEN Activity" denotes an advisory on management and production			
	improvement to the nominated high potential Mexican Auto Parts Suppliers.			
	improvement to the nominated high potential Mexican Auto Farts Suppliers.			
3-1.	SGs and ACs prepare the training plan for Mexican Auto Parts Suppliers.			Pre-Conditions
3-2.	SGs and ACs implement the training for quality management and productivity			Japanese Original
	control (KAIZEN).			Equipment Manufacturers
	SGs and ACs implement the training for business manners and practices.			(OEM) and Tier-1
3-4.	SGs and ACs evaluate the results of implemented training.			Automotive Suppliers have a
3-5.	SGs and ACs identify the new issues to be developed in the training plan.			policy to expand local
4-1	SGs and ACs review their policies and projects to promote the Mexican Auto			procurement.
1	Parts Suppliers.			There are Mexican enterprises
4-2	SGs and ACs identify the Mexican potential resources to be collaborated.			that can potentially come into
	SGs and ACs prepare the draft of support programs and/or measures (Master			the Japanese automotive
+-0.	Plan) to promote the development of Mexican Tier-2 Auto Parts Suppliers.			supply chain.
4-4	SGs and ACs submit above Master Plan to the concerned authorities.			3. SGs and ACs of each target
	SGs and AGs summarize the experiences and share them with the target states.			state provide human
- -5.	oos and 103 summanze the experiences and share them with the target states.			resources, budget and office
				space for Japanese experts
				necessary to implement the
				Project.
				Declaration of state of hygiene emergency due to
				COVID19 pandemic is lifted
				in Movice and Japan
				in Mexico and Japan.

Anexo 2. Plan de trabajo de los expertos / tabla de resultados (febrero 2024)

			Total M/M		No. de Misiones			
Cargo	Categoría	Plan/Real	todo el periodo	Este mes	Total	2021	2022	2023
Shuichi TAKANO		Pran original	12.35		11	0	6	5
Jefe del Equipo / Fortalecimiento de la cadena de proveeduría del	3	Ultimo plan	12.35		12	0	6	6
sector automotriz (vinculación público-privada)		Real	12.80	0.73	12	0	6	6
Akihiro INADA		Pran original	5.92		4	0	1	3
Sub-jefe del Equipo / Fortalecimiento de la cadena de proveeduría	3	Ultimo plan	5.92		4	0	1	3
del sector automotriz (necesidades del capital humano industrial)		Real	5.75	0.42	4	0	1	3
Koji YO		Pran original	6.00		4	0	2	2
Asistencia en KAIZEN (moldeo por inyección de plástico 1)	3	Ultimo plan	6.00		6	0	2	4
		Real	7.63	0.15	6	0	2	4
Sadakatsu HASHIMOTO		Pran original	2.42		1	0	0	1
Asistencia en KAIZEN (moldeo por inyección de plástico 2)	3	Ultimo plan	2.42		1	0	0	1
		Real	2.42	0.00	1	0	0	1
Takato SHUHAMA		Pran original	8.77		7	0	3	4
Asistencia en KAIZEN (prensado)/ (forja 1)	3	Ultimo plan	8.77		9	0	3	6
		Real	8.18	0.00	8	0	3	5
Toyosaku NAKAMURA		Pran original	7.43		5	0	4	1
Asistencia en KAIZEN (corte de precisión)/(forja 2)	3	Ultimo plan	7.43		4	0	4	0
		Real	5.77	0.00	4	0	4	0
Akira IIDA		Pran original	2.95		0	0	0	0
Asistencia en KAIZEN (gestión de calidad)	3	Ultimo plan	2.95		0	0	0	0
		Real	3.20	0.00	0	0	0	0
Noriyuki YOSHIDA		Pran original	4.70		5	0	2	3
Asistencia en KAIZEN (gestión de producción 1)	3	Ultimo plan	4.70		3	0	2	1
		Real	3.08	0.00	3	0	2	1
Hironori KAWANAKA		Pran original	6.98		6	0	3	3
Asistencia en KAIZEN (gestión de producción 2)	3	Ultimo plan	6.98		3	0	3	0
		Real	6.13	0.35	3	0	3	0
Kenzo MORI		Pran original	12.67		10	0	5	5
Sistema de extensión de KAIZEN (desarrollo de programas)	3	Ultimo plan	12.67		10	0	5	5
		Real	12.63	0.61	10	0	5	5
Yoshihiro KANETSUNA		Pran original	0.47		1	0	0	1
Sistema de extensión de KAIZEN (desarrollo de programas) 2	3	Ultimo plan	0.47		1	0	0	1
		Real	1.13	0.56	2	0	0	2

			Total M/M		No. de Misiones			
Cargo	Categoría	Plan/Real	todo el periodo	Este mes	Total	2021	2022	2023
Takao KIKUCHI		Pran original	4.03		5	0	3	2
Sistema de extensión de KAIZEN (institucionalización)	3	Ultimo plan	4.03		5	0	3	2
		Real	4.07	0.00	5	0	3	2
Tomoko INABA		Pran original	5.12		4	0	1	3
Desarrollo de negocios	3	Ultimo plan	5.12		4	0	1	3
	•	Real	4.93	0.66	4	0	1	3
HUERTA PONCE Moises Zenon		Pran original	11.82		9	0	5	4
Coordinación y logísticas / plan de capacitación	5	Ultimo plan	11.82		10	0	5	5
		Real	13.92	0.74	10	0	5	5
Plan original (Total)		·	91.63		72	0	35	37
Ultimo plan (Total)		91.63		72	0	35	37	
	Real (Total)	-	91.64	4.22	72	0	35	37

Anexo 3. Miembros asesores de Kaizen selectionados

(1) AGS

Tipo	Nombre de la empresa	Nombre del participante	Cargo	Formación en Japón
Recursos	UTA	Ms. Yanid Acosta González	Profesora	0
externos	Consultría Integra	Mr. Jorge B. F. Rodríguez Calderón	Consultor	
	ITESM	Mr. Andreas Koch Schneider	Consultor	
	DINAMO	Mr. Rodrigo Carrillo Sancosme	Consultor	0
	DOT & DASH	Mr. Refugio Campos García	Consultor	0
Recursos de	Kitagawa	Mr. Francisco Javier Alejandro Villa Martinez	Sub-director de Produccion	
la empresa	Kitagawa	Ms. Sara Soraya Richarte	Gerente de Control de Produccion	
	Kitagawa	Mr. Omar Salas	Machining Engineering, Manager	
	Kitagawa	Mr. Felipe de Jesús Alfaro Torres	QA Manager	
	Kitagawa	Mr. Diego de Jesús Loera Villafan	Jefe de Produccion de Fundicion	0
	Kitagawa	Mr. Jose Manuel Contreras Lopez	Jefe de Produccion de Maquinado	0
	Mexstamp	Mr. Omar Jahzeel Dominguez Guerrero	Jefe de Produccion y Troqueles	0
	Doiter Casting	Ms. Claudia Priscilla Mata	Gerente de QA	0
	Beyonz	Mr. Carlos Alberto Herrera Bernal	Sub-director de Produccion	0
	Beyonz	Ms. Ana Laura Nava Mayer	Sub-gerente de Calidad	
	Beyonz	Ms. Martha Cecilia Amaya Valdés	QA Engineer	

(2) GTO

Tipo	Nombre de la empresa	Nombre del participante	Cargo	Formación en Japón
Recursos	Consultor Privado	Mr. Joel Martínez Padilla	Consultor	0
externos	Conalep Irapuato	Mr. José Luis Vital León	Docente, Master Core	0
	Conalep Irapuato	Ms. Sandra Edith Martínez Gaspar	Docente, Core	
Recursos de	G-One	Mr. Miguel Hernandez Ramos	Senior Technical Staff	0
la empresa	G-One	Mr. Gerardo Gasca Nieto	Purchasing Associate	
	G-Tekt Mexico	Mr. José Luis Alfaro Alvarez	Assistant Manager, Maintenance & Manufacturing	0
	YAGM	Mr. Johnathan Andrés López Pacheco	Kaizen Engineer	0
	YAGM	Mr. Armando Mendez	Kaizen Engineer	
	HIROTEC	Ms. María Cristina Moreno Abundis	Supplier Quality Engineer	0
	Kostal Komex 2	Mr. Luis Angel Juárez Camacho	Process Engineer	
	Kostal Komex 2	Mr. Leonardo Cervantes Luna	Kaizen Engineer	
	MYPI	Ms. Melania Crespo García	Sub-gerente de Planta	

(3) QRO

Tipo	Nombre de la empresa	Nombre del participante	Cargo	Formación en Japón
Recursos	Cluster Automotoriz	Mr. David Romero Saavedra	Consultor	0
externos	Conalep: San Juan del Rio	Ms. Juana Norma González Mejia	Docente, Master Core	
	Conalep: San Juan del Rio	Ms. María Del Socorro González Piña	Docente, Core	
Recursos de	NIPSA	Mr. Ryo Kubagawa	Production Manager	
la empresa	NIPSA	Mr. Luis Angel Hernández Vázquez	Process Engineer	0
	NMG	Mr. Luis Alberto González de Jesús	QA Manager	0
	PSM	Mr. Oliver Fischer Cano	Gerente de Ingenieria	0
	PSM	Ms. Araceli Antonio Hernández	Process control Engineer	
	TYRSA	Ms. Javier Flores Ochoa	Gestor de Mejora Continua	

(4) SLP

Tipo	Nombre de la empresa	Nombre del participante	Cargo	Formación en Japón
Recursos	Universidad: Politécnica SLP	Ms. Mónica M. Zaldivar Muñoz	Docente	0
externos	Universidad: Tecnológica de SLP	Ms. Elizabeth Salazar Salas	Docente	0
	ITSLP	Ms. Rosa Hilda Félix Jácquez	Docente	0
	Dukke Consultores	Mr. Victor Orlando Tostado Badillo	Consultor	0
	Consultor Privado	Mr. Ricardo Rodriguez Martínez	Consultor	
Recursos de	EKK Eagle	Ms. Claudia Mahelet Mendoza Ayala	Staff in charge of TDC	0
la empresa	EKK Eagle	Ms. Alma Cristina Hernández Torres	Quality Engineer	0
	EKK Eagle	Mr. Edgar Eduardo Moreno Lemus	Engineering Coodinator	0
	PAPSA	Ms. Alondra Jaramillo Colmenero	Ingeniero de Mejora continua	
	PAPSA	Mr. Luis Enrique Ramírez González	Ingeniero de Mejora continua	