

**e-smartec**

## **Task 1.3 Capacity building for effective marketing approach in mobility planning**

<b>Document/Deliverable name</b>	<b>Report on "Capacity building on marketing techniques incorporation in SUMP development"</b>
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<b>Reviewer (s)</b>	<b>All</b>
<b>Status (Final, Draft)</b>	<b>Final</b>
<b>Comments</b>	
<b>Date</b>	<b>September 15<sup>th</sup> 2021</b>

This deliverable has been produced as part of e-smartec project.

e-smartec is a 3-year project, funded under the Interreg Europe Programme 2014-2020 and the thematic area of Low Carbon Economy.

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Low-carbon  
economy



1.37 M  
ERDF



1 Aug 2019  
31 Jul 2022



European Union  
European Regional  
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## 1. Introduction

### 1.1 Project overview

Many European urban areas face a series of environmental challenges linked to mobility, ranging from congestion to air pollution. Based on common experience, sustainable urban mobility planning cannot be achieved without the commitment of key stakeholders and travellers. Users' engagement in mobility planning is often a big challenge for authorities, since it requires deep knowledge of marketing and sociological aspects.

The e-smartec project is a 3-year project, funded under the Interreg Europe Project on the thematic area of Low Carbon Economy. The project started at the beginning of August 2019 and consists of two phases: phase 1 has a duration of 2 years, while phase 2 has a duration of 1 year.

e-smartec aims at reinforcing existing policies and programmes by enhancing each step of mobility planning through the deployment of targeted marketing techniques for linking bottom-up and top-down decision making. The overall goal is to develop action plans that provide tailored guidelines on citizens' and stakeholders' engagement marketing techniques.

### 1.2 Task 1.3 overview

The key objective of task 1.3 is to implement a set of Capacity building activities and supporting materials in order to improve the co-planning and awareness raising on sustainable mobility.

T 1.3 delivers the project's experience on how to effectively involve marketing approaches in sustainable mobility planning, in relation to Sustainable Urban Mobility Plans (SUMP). Task 1.3 builds upon the experience and project material produced during Tasks 1.1 and 1.2, especially the analysis of the GPs for the sustainable urban planning process and the Handbook for success tips on marketing techniques.

Six targeted, hands-on trainings on SUMP and participatory sustainable mobility planning have taken place (one in each participating Region) during the March – May 2021 period. The involved audience includes staff members and decision makers of regional plus local authorities, with each region identifying its list of potential stakeholders to invite.

Task 1.3 contributes to achieve the project's general objectives:

- Number of policy learning events organised = 31. The training events in each region are included here (6 in total).
- Number of people with increased professional capacity due to their participation in interregional cooperation activities = 80.

#### TASK 1.3 POSITIONING IN RELATION TO SUMP

"SUMP is a strategic and integrated approach for dealing effectively with the complexities of urban transport. Its core goal is to **improve accessibility and quality of life** by achieving a

shift towards sustainable mobility". (Rif. *ELTIS Guidelines 2019*  
<https://www.eltis.org/it/mobility-plans/sump-guidelines>)

The SUMP concept, introduced in 2005 and finally disseminated through the ELTIS platform with the first guidelines in 2013, has since then revolutionized urban planning.

The consultations taking place since 2005 amongst mobility experts in Europe have led to the assumption that mobility planning in the future should have taken sustainability into account. Greater attention was needed to the conscious use of resources, to health, territory management in concert with the population, not to mention thinking about future developments in terms of occupational efficiency.

Therefore, sustainable planning requires a long-term vision that focuses on the needs of communities, territories and populations, emphasizing the principle of planning to reduce traffic and make the road and transport system more efficient (Figure 1).

TRADITIONAL TRANSPORT PLANNING		SUSTAINABLE URBAN MOBILITY PLANNING
FOCUS ON TRAFFIC	➔	FOCUS ON PEOPLE
PRIMARY OBJECTIVES: Traffic flow capacity and speed	➔	PRIMARY OBJECTIVES: Accessibility and quality of life, social equity, health, environmental quality, economic viability
MODE-FOCUSSED	➔	INTEGRATED DEVELOPMENT OF ALL TRANSPORT MODES AND SHIFT TOWARDS SUSTAINABLE MOBILITY
INFRASTRUCTURE AS THE MAIN TOPIC	➔	COMBINATION OF INFRASTRUCTURE, MARKET, REGULATION INFORMATION AND PROMOTION
SECTORAL PLANNING DOCUMENT	➔	PLANNING DOCUMENT CONSISTENT WITH RELATED POLICY AREAS
SHORT AND MEDIUM-TERM DELIVERY PLAN	➔	SHORT AND MEDIUM-TERM DELIVERY PLAN EMBEDDED IN A LONG-TERM VISION AND STRATEGY
COVERING AN ADMINISTRATIVE AREA	➔	COVERING A FUNCTIONAL URBAN AREA BASE ON A TRAVEL-TO-WORK FLOW
DOMAIN OF TRAFFIC ENGINEERS	➔	INTERDISCIPLINARY PLANNING TEAMS
PLANNING BY EXPERTS	➔	PLANNING WITH THE INVOLVEMENT OF STAKEHOLDERS AND CITIZENS USING A PARTICIPATORY APPROACH
LIMITED IMPACT ASSESSMENT	➔	SYSTEMATIC EVALUATION OF IMPACTS TO FACILITATE LEARNING AND IMPROVEMENT.

Figure 1: Differences between traditional transport planning and SUMP (©Rupprecht Consult 2019)

Below are the **SUMP's eight fundamental principles**:

1. Plan for sustainable mobility in the entire 'functional urban area';
2. Cooperate across institutional boundaries;
3. Involve citizens and stakeholders;
4. Assess current and future performance;

5. Define a long-term vision and a clear implementation plan;
6. Develop all transport modes in an integrated manner;
7. Arrange for monitoring and evaluation;
8. Assure quality

SUMP's main goal to "**PLAN FOR PEOPLE**" in relation to the "**FUNCTIONAL AREA**", brings several requirements also in relation to involving many stakeholders, starting from a bottom-up approach, "listening" to the territory, finding ways to involve, motivate and activate proactive participation in mobility planning.

The e-smartec project specifically relates to the SUMP's requirement to stimulate the proactive participation of citizens and stakeholders in sustainable mobility planning, as well as to support a more effective achievement of a behavioural change for citizens in the adoption of more sustainable habits with reference to their everyday mobility. The challenge and the novelty of the project lies in identifying and applying marketing techniques and related methods for raising awareness and linking bottom-up and top-down decision making through a facilitated dialogue between planners, stakeholder, and citizens.

The role of **local authorities** and **local stakeholders** is thus very important in this phase, both to make them aware of the innovations that SUMP is bringing in the planning process and to provide them with tools to change their attitude and habits in their daily work.

The aim of the "hands-on training" activities of Task 1.3 is provided below.

### 1.3 About this document

This report summarises the activities performed by the e-smartec partners, under the guidance of Task Leader RSM and Lead Partner CERTH, to produce the training material on marketing techniques and engagement methods for the participatory planning in SUMP and to adapt it to the respective regions.

This document provides the details about the training methodology development.

The development of this activity was strongly affected by the COVID-19 pandemic started in the year 2020, which meant that all the meeting-related activities had to be carried out remotely. As a result, the preparation of the training material has undergone a review and the activity has been readjusted.

In particular, this document will describe the logical steps, problems and solutions adopted.

Furthermore, this report also aims to be a guide for those who want to repeat or propose for the first time the training activity on SUMP and participatory processes in other contexts.

The report also includes four annexes. They include all of the training materials that have been used by the regional partners during the training practice.

## 2. Methodology to develop the training programme

The choice to involve the aforementioned target groups into the e-smartec capacity building activities will benefit decision makers, engineers, communication specialists, and the other stakeholders by advancing their knowledge and awareness on how to involve citizens in the participatory planning and how to increase citizen awareness for SUMP and relevant sustainable transport solutions.

The e-smartec hands-on training aims at providing specific knowledge (as developed by the project) to targeted mobility planners of city or regional **authorities**, as well as local and regional **stakeholders**. Each regional partner has identified such two groups (authorities and stakeholders) as key players engaging citizens and stakeholders in sustainable mobility planning and implementation.

### 2.1 Structure of the training events

The online training has been designed and implemented as a 3-hour modular course, including an interactive, practical exercise. Feedback from the regional partners has been delivered through the “e-smartec template to report training activities in the region” for internal use.

The complexity of the topic to be treated, combined with the need to be brief and keep the learners’ attention high, led to the decision to develop a course based on 3 modules. To ensure interaction, some polls have been designed and proposed to the audience between the training modules.

The training material was thus developed as a package consisting of the following three modules:

**MODULE 1: THE THEORY** - The first theoretical module of the training is based on the handbook, and presents each marketing technique and engagement method, plus the concept of involvement and participation on different levels. This part also includes a reminder about the SUMP cycle and its 4 phases.

**MODULE 2: THE EXAMPLES** - It is based on the Good Practices. A template for the GPs presentation and some first GPs were proposed by RSM (including the Rome’s extensive SUMP engagement process). The objective of this module is to demonstrate how a real-life project can be defined and represented through the participatory planning.

**MODULE 3: THE EXERCISE** - It is the interactive and practical part. For the purpose of the exercise, the participants get divided into small groups (of 5-7 people each), coordinated by a facilitator, and are asked to set-up the participatory planning process/strategy of the SUMP of a “*our city*” (more details to follow)

The common training material, produced in English, is provided in **Annex I** of the current document (translations are available also in Italian, Greek, German, Dutch and Slovak).

### 2.2 The Training material

For the delivery of the hands-on trainings a common training material was first developed.

The production of training material required a long ideation (and iteration) process within the project consortium, since it involved project knowledge deriving from other activities (Tasks 1.1 and 1.2), had to be adapted to on-line sessions, as well as be “universal” for all the regions involved.

Basic inputs for the training material have been the following project’s deliverables:

- [Handbook on success tips on marketing techniques](#)
- List of Good Practices (GPs) of participatory planning and sustainable transport awareness raising that were collected from and described by the partners in the 6 regions involved (see e-smartec [report on GPs](#)).
- Analysis and categorization of the GPs (see e-smartec [e-library](#) and [categorization report](#)).

During the preparation phase of the training material the following issues were raised, and relevant solutions have been proposed:

#### ISSUE #1: VISUAL REPRESENTATION

The training development process dealt with the issue of how to represent participatory processes in a synthetic, comprehensive and, at the same time, attractive way. It was decided to create a “card” for each marketing technique, including the following elements:

- name of the marketing technique,
- participatory methods that are categorized under this marketing technique,
- target groups (citizens and / or stakeholders)
- cost and timing with respect to the four phases of the SUMP

An example of such a card is displayed in the figure below. The complete set of the cards for the marketing techniques is presented in **Annex I**, as part of the training material.



Figure 2: Examples of marketing technique cards

## ISSUE #2 TRANSLATIONS

The training has been carried out in various local languages; therefore, each region has translated the material, which is available in **six different languages**: English, Greek, Italian, Slovak, Dutch and German. Translations are also included in **Annex I**, as part of the training material.

## ISSUE #3 POLLING

As already mentioned, to better interact with the participants, short polls have been proposed.

In total, five polls were proposed.

1. Ice-breaking – subject: basics about SUMP
2. After training module 1 – subject: Marketing techniques
3. After training module 2 – subject: Organisational aspects in relation to SUMP
4. Before the exercise - Repetition of the “ice-breaking”
5. Closing survey for participant – subject: satisfaction about the knowledge gained

The first poll is designed to understand the basic knowledge of the participants about SUMP and participatory planning. The following two polls were embedded at the end of the training modules 1 and 2 to allow the moderators to understand how completely the participants have understood the theory. The fourth poll repeated the “ice-breaking survey” (in order to assess the effectiveness of the training), while the last was a closing survey to understand the satisfaction about the training session and the propensity to take into consideration and disseminate in the future the concepts related to participatory planning in SUMP.

The polls are provided in **Annex IV** of the current document.

## ISSUE #4 FLEXIBILITY

It has been decided to allow for some flexibility to the content of the training material, in order to allow the session to be adapted to local conditions, thus increasing its effectiveness.

To this end, for *Module 2* each regional partner had the flexibility to present 2 Good Practices that made the understanding more effective for the local audience. Keeping, though, Rome’s SUMP GP fixed (as it provided a complete and comprehensive example of a SUMP engagement strategy).

In *Module 3* the “**our city**” example could be adapted. This means that as for the previous Module, the exercise could be performed using the most effective example. In fact, a partners requested to use their real-life SUMP process. Therefore, this decision was left up to the regions (Venlo and Bratislava used real-life examples of their regions, more details to follow).

Also, the questions of the surveys could be partially adapted without changing the general approach.

## ISSUE #5 BUDGET

During the preparation phase of the training RSM proposed a Microsoft Excel based tool to simulate the spending of the entire participatory process. RSM set up a Microsoft Excel sheet that, fixing an expenditure ceiling, allows taking the budget under control phase by phase. For the exercise, the maximum budget was set as 90,000EUR.

The spreadsheet is provided in **Annex II** of the current document.

## 3. e-smartec hands-on training events in the Regions

The hands-on trainings on SUMP participatory planning were delivered in each participating Region according to the following calendar.

*Table 1: Date and format of the e-smartec hands-on training events*

Region /City	Date	Format
Central Macedonia	04 and 05/03/2021	Online
West Midlands	13/05/2021	Online
Rome/Lazio Region	05/05/2021	Online
Bratislava Self-Governing Region	22/04/2021	Online
Venlo Region	04/03 and 30/04 2021	Online
State of Hessen	31/03/2021	Online

With the exception of Central Macedonia and Venlo Noord-Limburg, where the hands-on training was delivered in a two-day period (separating modules 1 and 2 – theory and GPs - from module 3 – exercise), the trainings were implemented within a 3-hour duration of a single day.

## ISSUE #6 TRAIN THE TRAINER

A preliminary “*Train the Trainers*” session was given by RSM (with the support of LCU) to the consortium in charge of the facilitators’ preparation to help them practice with the interactive exercise tools. The team members were trained and had a systematic rehearsal of the interactive exercise.

Partners were encouraged to use any shared working tools and online meeting platforms they wanted, as long as it was possible to create breakout rooms, work on shared on-line files, write and share comments in chat.

Thus, the partners had the chance to discuss, give suggestions, improve, and perform the part that each one of them had undertaken for the successful implementation of the hands-on training in their region.

## ISSUE #7 INVITATIONS

Particular attention was paid to the invitations sent out for the training session. The task leader suggested the use of a common invitation letter in the registration phase along with an

ex-ante survey to understand the profile and current experience of the participants regarding engagement processes and SUMP. These were customized and translated by each partner, who chose the most appropriate way to send the invitation. An agenda for the delivery of the hands-on training was also fixed.

Each Region decided which material to share in advance (by post or by e-mail).

The invitation template, the agenda and the ex-ante survey are provided in **Annex III** of the current document.

**MODULE 3** – The interactive exercise of the training was carried out by dividing, where possible, the attendees into groups of 5 people. During this training module, the participants had to put into practice what was presented and explained during the plenary session in *Modules 1 and 2*.

Participants have been provided with basic information on the "our city" use case:

- City of artistic relevance, with a high tourist appeal;
- Medium-sized city: 160,000 inhabitants.
- The population density is very low
- High use of private vehicles
- High values of the accident rate compared to cities with a similar number of inhabitants.
- The digitalization level index: medium
- The current responsibility level index: medium – high

(Detailed city characteristics in Annex I).

In addition, the proposed political and strategic objectives to be achieved with the "our city" SUMP are:

- Enhance the Pedestrian Area of the historical center;
- Expand the LTZ of the historical center;
- Increase the total of the cycling and the cycling path;
- Decrease of car travel and rise the inter-modality between private and public modes.

Trainees had to develop the strategy for approaching citizens and stakeholders for each phase of the SUMP, using the cards on marketing techniques, and considering time and budget constraints. The elements to build up the cards could be picked and placed within the Google slides.

Trainees had to retrace the 4 phases of the SUMP, reflecting on the objectives of each phase, on the stakeholders involved, on their role, on the marketing techniques and engagement methods and finally on costs. In ninety minutes, the groups in each region produced the final **Roadmap** and associated "**Cards**" (Annex I). Furthermore, most of the groups also worked on the budget on the "**Check Capacity Building**" tool (Annex II), this allowed an evaluation of the budget elements. A very thorough work has been done, despite the time constraints.

At the end of each regional training event, the local coordinators have produced a short regional report (internal), upon a common template provided by the task leader.

The main results and outputs of the six regional training reports have been summarized in Chapter 3 of this document.

Beyond the results of the regional training and the feedback from the participants, the regional reports also reflected on territorial information regarding the progress of SUMP. In addition, the partners reported the results of the questionnaires, providing interesting observations. Unfortunately, due to time constraints, it was not possible to carry out the self-assessment survey from the ELTIS guidelines in any of the six regions.

The feedback on Module 3 for each of the working groups has been represented in a one-page scheme (Figure 3), which includes all the elements to be considered when designing the participatory planning phases of the SUMP.

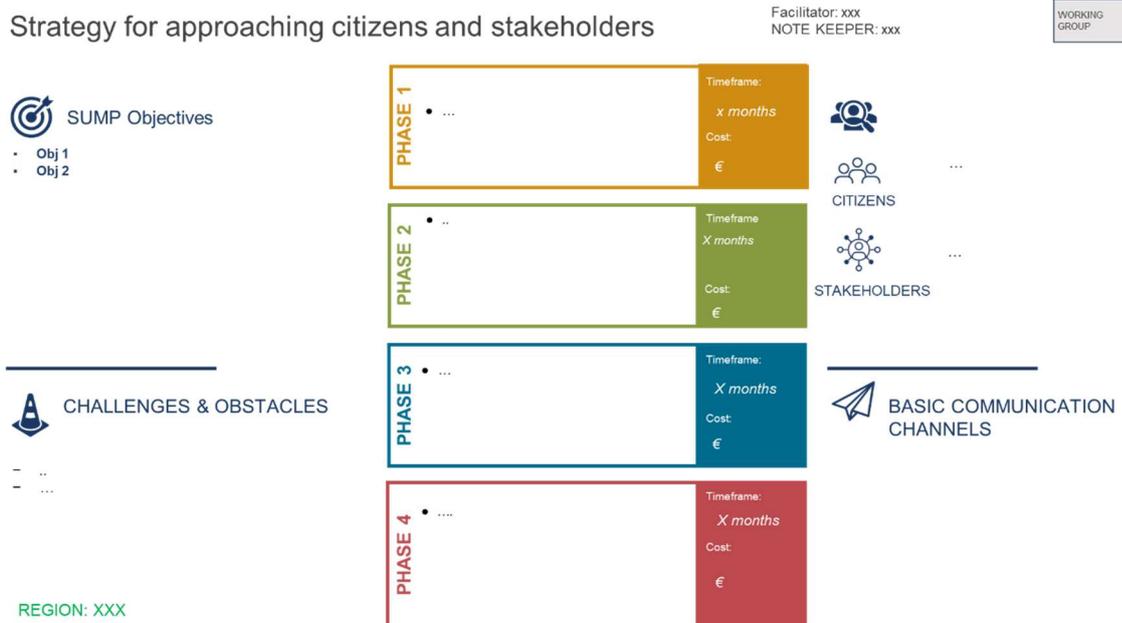


Figure 3: One-page scheme to report Module 3 exercise

Key insights and results from the hands-on trainings from each region are provided below.

### 3.1 Region of Central Macedonia

As far as the SUMP development is concerned, it should be noted that 24 of the 38 Municipalities of the Region of Central Macedonia have secured funding to develop SUMPs. By July 2021, 9 Municipalities of RCM were preparing for SUMP development, 10 Municipalities were developing SUMP and other six have already implemented their SUMP. Efforts to provide support for the SUMP development are made through the [SUMP Competence Center](#) (CC), which has been developed as an open online platform that

provides information and support to the Municipalities for the implementation, monitoring and updating of their SUMP.

Due to the ongoing or already concluded SUMP processes in many of the municipalities, citizens' and stakeholders' awareness about SUMP was also quite high. Despite this, citizens were still not strongly involved in mobility planning.

At the time the hands-on trainings took place in the Region of Central Macedonia, the knowledge of the municipal staff member regarding SUMP processes was at a good level and many executives of the Municipalities had already been involved in engaging citizens and stakeholders in sustainable mobility planning. Nonetheless, gaps in the knowledge on marketing techniques still remained.

The aim of the two-day seminar held for executives of the Municipalities of the Region of Central Macedonia was to share with them the knowledge of «The use of marketing techniques in order to increase the participation of citizens and stakeholders in the implementation of SUMP».

*Facilitators and participants:* For the hands-on training in RCM, 38 invitations were sent to the Municipalities, 18 people registered and eventually 11 of them participated, representing 9 Municipalities.

Based on the registrations for the training, participants were divided into two working groups for the exercise. Two facilitators were selected (one per working group): Maria Sitzoglou, external expert of CERTH and Maria Chatziathanasiou, research associate of CERTH. For the best organization two more team members (one per working group) undertook the role of the “Note keeper”.

*IT facilities:* Zoom for the web meeting and Jamboard for the implementation of the interactive exercise

Material shared in advance included the:

- (i) agenda,
- (ii) e-smartec Handbook on success tips on marketing techniques
- (iii) Participant's Kit, a short version of the handbook, presenting marketing techniques and participatory practices in the Greek language (provided in **Annex I**, as part of the training material), and
- (iv) link to the website of the SUMP Competence Center of RCM

The outcomes of Module 3 for the two working groups are presented in the figures below. Some screenshots from the training session are also provided.

### Strategy for approaching citizens and institutions

FACILITATOR: Maria Sitzoglou  
NOTE KEEPER: Andriana Demirtzoglou

WORKING GROUP 1

#### SUMP OBJECTIVES

- 50% reduction in the use of passenger cars, especially in the historic center of the city
- 25% increase in the use of Public Transport
- 10% increase in the use of bike lanes
- 10% increase in pedestrian movement
- 20% increase of the sidewalk network in the historic center of the city
- 30% increase of the bus network in the city
- 20% increase in the area of Public Transport network
- 15% increase in infrastructure to enhance electromobility

#### CHALLENGES & OBSTACLES

- Conflicting interests of institutions - citizens
- Selection of bodies. Attracting interest
- Adherence to old habits

<b>PHASE 1</b>	<ul style="list-style-type: none"> <li>• Survey with thematic sections</li> <li>• Online participation through a single platform that will be used at all stages</li> </ul>	Timeframe: 2 months Cost: 6000 euros
<b>PHASE 2</b>	<ul style="list-style-type: none"> <li>• e-Participation (interaction for SUMP objectives)</li> <li>• Thematic Discussion Groups with actors</li> <li>• Ambassador Campaign- working with public figures to promote sustainable mobility standards</li> </ul>	Timeframe: 1 month (campaign) 2-3 discussion groups Cost: 6000 euros
<b>PHASE 3</b>	<ul style="list-style-type: none"> <li>• Pilot interventions (daily, periodic, small)</li> <li>• Communication campaign with visualization of interventions (photoshop, examples from other cities)</li> <li>• Theatrical thematic performances (citizen groups / schools)</li> </ul>	Timeframe: 6 months Cost: 15.000 euros
<b>PHASE 4</b>	<ul style="list-style-type: none"> <li>• Training for parents and students with the cooperation of the Municipality / implementation in school communities</li> <li>• Training in targeted groups (Open Care Center for the Elderly, Universities)</li> <li>• Public events in central parts of the Municipality in collaboration with NGOs</li> <li>• Popular events (eg in collaboration with chambers)</li> </ul>	Timeframe: XXX Cost: 13.000 euros

#### FOCUS GROUPS

CITIZENS  
Public  
Parents and students  
Elderly  
Local businessmen

STAKEHOLDERS  
Local institutions  
Support from the Municipality  
Urban Public Transport of Thessaloniki  
Universities  
Chambers

#### BASIC COMMUNICATION CHANNELS

- Social media
- Mobility week
- Universities
- Local channels
- Municipality website
- National campaign / comprehensive campaigns of the Municipality with a wide theme

Figure 4: Module 3 results for the 1st working group in RCM

### Strategy for approaching citizens and institutions

FACILITATOR: Maria Chatziathanassiou  
NOTE KEEPER: Glykeria Myrovali

WORKING GROUP 2

#### SUMP OBJECTIVES

- 50% reduction in the use of passenger cars, especially in the historic center of the city
- 25% increase in the use of Public Transport
- 10% increase in the use of bike lanes
- 10% increase in pedestrian movement
- 20% increase of the sidewalk network in the historic center of the city
- 30% increase of the bus network in the city
- 20% increase in the area of Public Transport network
- 15% increase in infrastructure to enhance electromobility

#### CHALLENGES & OBSTACLES

- # 1 Lack of Data - reluctance to participate in data collection (Phase. 1 with emphasis)
- # 2 "Narrow" perspective, "sectoral" position orientation, Conflicting "interests"
- # 3 LACK OF CITIZENS' TRUST IN PUBLIC CONSULTATION AND PARTICIPATING APPROACH / Insufficient citizen participation due to lack of interest / Considering that they are asked to help with a fait accompli
- # 4 In small municipalities there is political controversy and reluctance to provide assistance to the opposite factions.
- # 5 SMALL INTEREST OF STAKEHOLDERS
- # 6 conflict of collective and individual interest - The misconception that there are conflicting interests
- # 7 inability to communicate the target
- # 8 Internal changes in representation and on the "agreed" (Phase 4. with emphasis)

<b>PHASE 1</b>	Online campaign (due to social popularity) for collecting mobility needs	Timeframe: 1 month Cost: 3000 euros
<b>PHASE 2</b>	Participatory workshops - Prioritization of objectives	Timeframe: 3 hours Cost: 500 euros
<b>PHASE 3</b>	Public events - debate type - structured questions, roles	Timeframe: 2 hours Cost: 4000 euros
<b>PHASE 4</b>	Communication campaign to understand the need for measures - e.g. one-way or two-way roads/ road blockades	Timeframe: 1 month Cost: 2000 euros

#### TARGET GROUPS

CITIZENS  
Disabled People Associations  
Pupils, students, general public

STAKEHOLDERS  
Professional bodies (chamber of commerce and technical chamber), Urban Buses, TAXI, Public Transport, Traffic Police, freight taxi, courier companies, hoteliers, professionals in tourism  
Technical Associations  
Academic institutions or large professional entities that constitute a mobile community

#### BASIC COMMUNICATION CHANNELS

- Radio advertising, local media
- social media
- use of popular websites (Municipality's website, Region's website, etc.)
- Email
- maps, visual material

Figure 5: Module 3 results for the 2nd working group in RCM

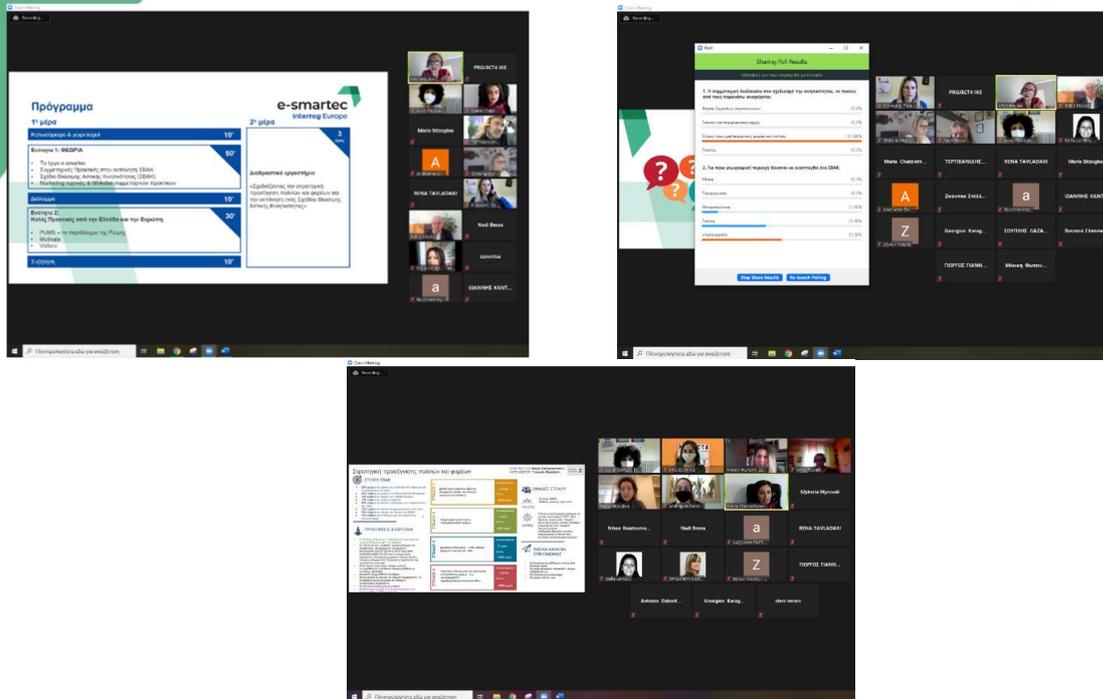


Figure 6: Screenshots from the training session in RCM

### 3.2 West Midlands

In the West Midlands, the city of Birmingham has adopted a SUMP called Birmingham Connected. This has the objectives of reinventing Birmingham’s transport system to meet mobility challenges; experience in creating SUMP for Birmingham is used in creating SUMPs for the surrounding West Midlands Metropolitan area including Coventry. Coventry is currently developing the SUMP within the [SUITS project](#) (Sustainable Urban Integrated Transport Solutions).

In West Midlands the training aimed at people working in transport, sustainable mobility planning, citizens’ engagement and marketing functions in Local Authorities.

The main objective was to share with the participants’ knowledge about marketing techniques to promote the implementation of SUMPs and increase the involvement of citizens and stakeholders.

**Facilitators and participants:** Invitations were sent to the main Councils and Institutions dealing with transport and mobility, they had a limited experience on SUMPS and marketing camping. In total, 74 invitations were sent, 13 people registered and 9 participated.

Giuliana Famiglietti-Pipola, Business Delivery Manager – Economic Policy International at CUE Ltd delivered the training session and facilitated module 3.

Alba Avarello, Projects Support Officer at CUE Ltd had the role of Note Keeper by taking notes of the participants’ comments during the exercise.

IT facilities: MS Teams

Material shared in advance included the:

- (i) agenda
- (ii) presentation delivered for Modules 1 and 2 of the training days
- (v) e-smartec Handbook on success tips on marketing techniques

The exercise was performed using the “some city” example proposed by the task leader.

The macro-strategic policy objectives that were used for the exercise were as follows:

- 50% reduction in the use of passenger cars in the historic center of the city
- 20% increase in footfall in the historic center of the city
- 50% reduction of parking requirements

The outcomes of Module 3 for the working group in WM are presented in the figure below. Some screenshots from the training session are also provided.

### Strategy for approaching citizens and stakeholders

Facilitator: Giuliana Famiglietti Pipola  
NOTE KEEPER: Alba Avarello

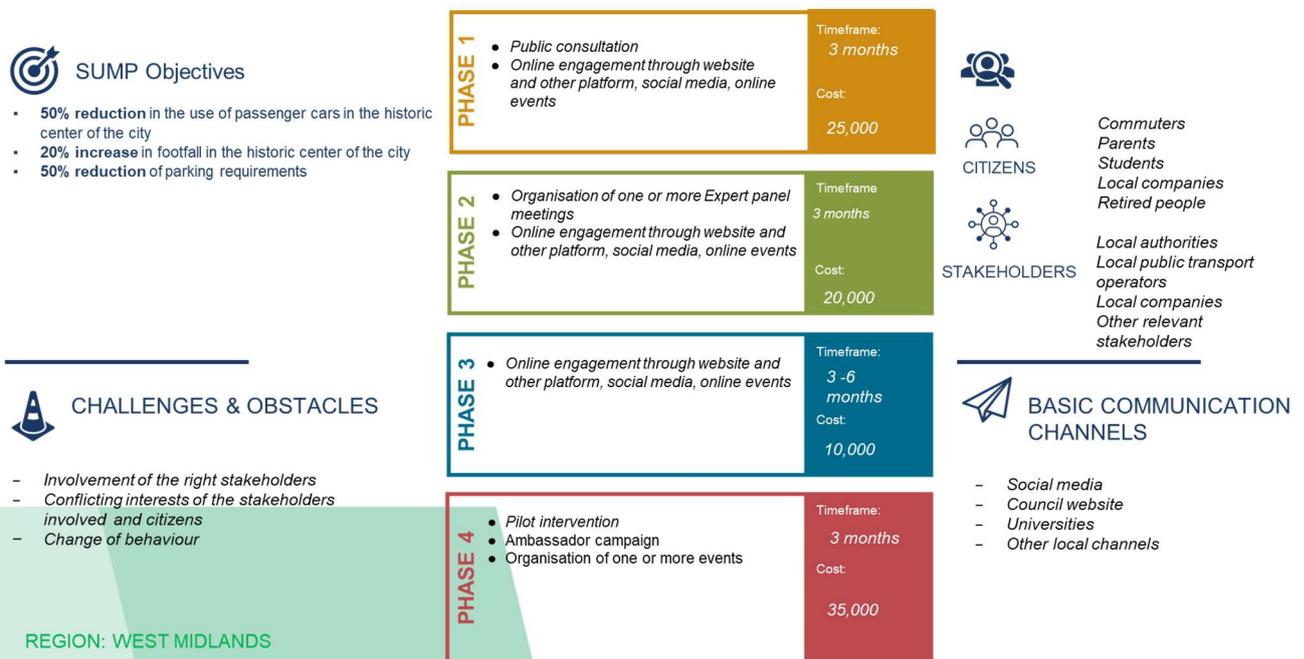


Figure 7: Module 3 results for the 2nd working group in WM

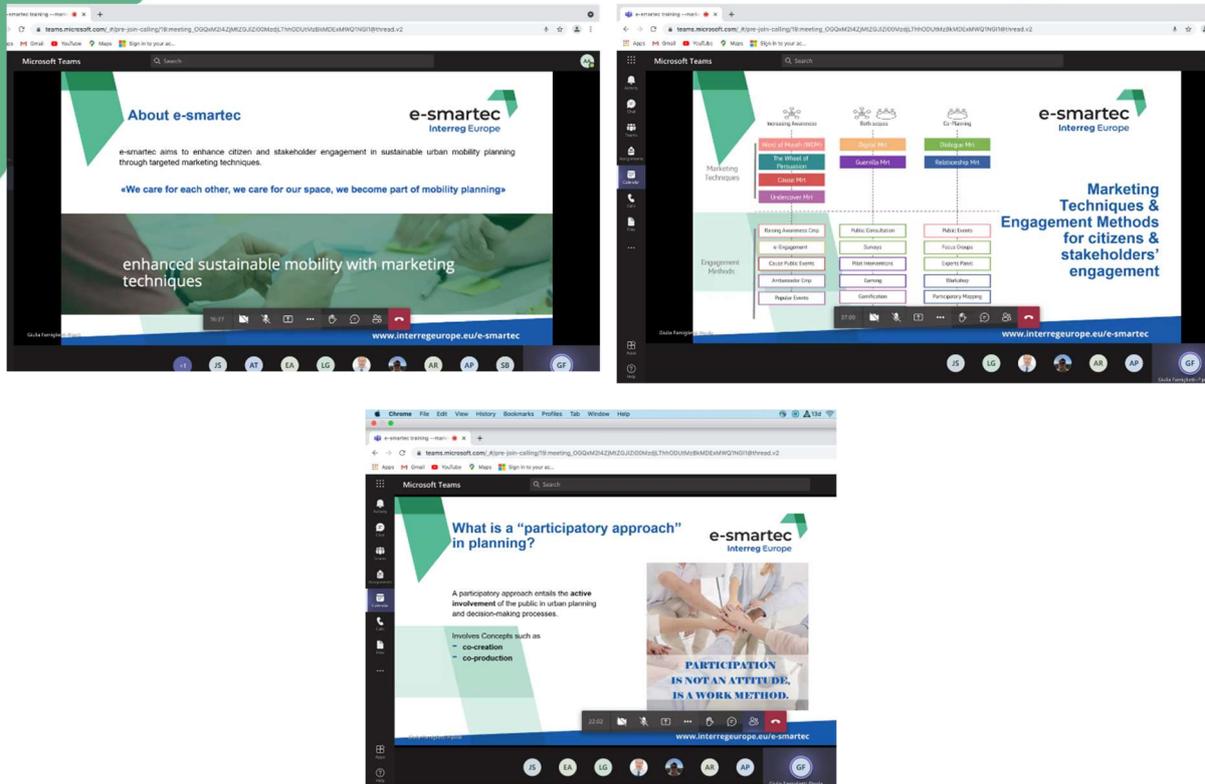


Figure 8: Screenshots from the training session in WM

### 3.3 City of Rome and Lazio Region

The city of Rome has started to implement the SUMP in 2017 by participating in the dialogue at national level, with the Ministry of Infrastructure and Transportation. The SUMP in Rome has been adopted in August 2019, but it needs to be integrated with the Metropolitan Area. Staff and stakeholders working around the SUMP need to be sensitized and their awareness on the tools offered increased.

The objective of e-smartec hands-on training in Rome was to gain a varied involvement of audience in order to increase the knowledge and experience on participatory planning for the staff and stakeholders directly and indirectly involved in the process.

People were invited from the Region Lazio Staff, from the Department of Mobility, RSM itself, the municipalities of the Region and the Metropolitan Area.

The participants had a good background on SUMP for having worked on it either directly or indirectly, and they were aware of the participatory planning but did not have experience on marketing techniques.

**Facilitators and participants:** In total, 60 invitations were sent, 26 people registered and eventually 22 participated (13 of them taking part in the exercise). Two working groups were set up for the execution of the exercise.

The facilitators of the working groups in Rome were RSM staff members and external experts working for e-smartec, who are also directly and indirectly involved in the SUMP process implementation (Andrea Pasotto, Marco Surace, Chiara Di Majo, Alice Pennacchio, external expert for RSM, plus Sergio Colangione and Mario F. Schlitzer of Link Campus University - LCU). Mr. Fabio Nussio of RSM was also actively involved, as he oversees the technical coordination of the SUMP in Rome.

*IT facilities:* Google Meet for the meeting, Google Forms and Google drive for the shared collaboration.

Material shared in advance included the:

- (i) agenda
- (ii) e-smartec Handbook on success tips on marketing techniques
- (iii) ELTIS Guidelines on SUMP
- (iv) booklet of the cards with a short definition of each Marketing technique prepared by RSM ((provided in **Annex I**, in Italian, as part of the training material)

In Rome, attendees worked on the “our city” example. The two groups had different approaches:

*Group 1* considered all the strategic objectives proposed for the “our city” and did not consider any special circumstances (e.g., COVID). This group first set the objectives for each Phase of the SUMP and then accordingly decided the most appropriate approach to involve the citizens and/or the stakeholders. Work was done simultaneously on the two files, the *check capacity building budget* and the *Cards* on the shared power point.

### Strategy for approaching citizens and stakeholders



#### SUMP Objectives

- Enhance the pedestrian area of the historic center
- Expand the ZTL of the historic center
- Increase the cycle paths
- Decrease car travel and increase intermodality between public and private transport



#### CHALLENGES & OBSTACLES

- Reducing car use, increasing TPL use, favouring intermodality influencing behaviour and legislation aspects
- Stimulating the shift towards active mobility
- Strategies that support the use of bicycles and the demand for new cycle paths;
- Conflicting interests
- Resistance to change
- Risk of not reaching the correct target groups
- Lack of infrastructures

REGION/CITY: ROME

<b>PHASE 1</b>	<b>Context analysis of mobility in relation to the objectives set.</b> <ul style="list-style-type: none"> <li>• Focus Groups and expert groups (stakeholders and experts) – getting the commitment</li> <li>• E-engagement (citizens and stakeholders)</li> <li>• Guerilla Marketing and Awareness raising to get the higher involvement of the population.</li> </ul>	Timeframe: <b>4 months</b> Cost: <b>20,000€</b>
<b>PHASE 2</b>	<b>Consensus building. Targeted communication campaigns on territorial ambit:</b> <ul style="list-style-type: none"> <li>• Public Events</li> <li>• Surveys</li> <li>• Word of Mouth</li> <li>• Dialogue Marketing</li> <li>• Participatory Mapping</li> </ul>	Timeframe: <b>3-6 months</b> Cost: <b>25,000€</b>
<b>PHASE 3</b>	<b>Planning of measures and promotion of the SUMP proposals</b> <ul style="list-style-type: none"> <li>• Workshops (between politicians and stakeholders)</li> <li>• Raise awareness (possibility of collecting new information and feedback from citizens)</li> <li>• Relationship Marketing (to establish trust and cooperation)</li> </ul>	Timeframe: <b>6 months</b> Cost: <b>27.500€</b>
<b>PHASE 4</b>	<b>Communication campaigns on the implementation of projects and change of habits</b> <ul style="list-style-type: none"> <li>• Awareness Campaign, Pilot Interventions and Popular events as indirect ways of promoting the Plan with the citizens and the stakeholders and to get a wider and undifferentiated audience</li> </ul>	Timeframe: <b>Undefined</b> Cost: <b>17.500€</b>



CITIZENS



STAKEHOLDERS

Employees and employers  
Commuters  
Experts  
mobility managers, tourism, cycling, traders,

City Administration  
Local politicians  
Local Authorities  
PT operators  
Parking operators  
freight operators, etc.)



#### BASIC COMMUNICATION CHANNELS

- PH 1: Mailing list, web sites
- PH 2: Social media, web site, newspaper;
- PH 3: Social media, web sites, phone, posters, newspaper TV.
- PH 4: Web sites, Apps, Surveys newspaper, TV

Figure 9: Module 3 results for the 1st working group in ROME

For **Group 2**, the first decision that was made was about the circumstances: this group decided to develop their SUMP in a post-COVID era, imagining that people would be able to organize in-person events and meetings again. The macro-strategic policy objectives of the Region selected were:

- Increasing the diffusion of cycling and the cycling path length;
- Decreasing car travel and increasing intermodality between private and public transportation.

The interesting discussion about the marketing techniques, the methods to use, the cost and so on was very engaging but unfortunately, due to joined connection problems of one of the facilitators, group B wasn't able to complete the exercise.

### Strategy for approaching citizens and stakeholders

#### SUMP Objectives

- Increasing the modal share of cycling and the offer of new the cycling paths;
- Decreasing car travels and rising the intermodality between private and public transport modes.

#### CHALLENGES & OBSTACLES

- The Group took a lot of time to discuss about all the stakeholders to invite, especially in the first part of the exercise, and after it choosing the best marketing techniques.
- Post-Covid era, imagining being able to return to organize events and meetings in presence

REGION/CITY: ROME

<b>PHASE 1</b>	<b>Context analysis of mobility in relation to the objectives set</b> • Focus Groups and Expert Panel (stakeholders and experts) – getting the commitment • Workshops	Timeframe: 3 months
		Cost: € 10.000

#### FOCUS GROUPS



Citizens  
Local businessmen  
mobility managers, tourism,  
cycling, traders,

<b>PHASE 2</b>	<b>Consensus building. Targeted communication campaigns on territorial ambit</b> • Website, Public Events, Participatory Mapping; Surveys	Timeframe 6 months
		Cost: € 30.000



STAKEHOLDERS  
Local authorities, Local public transport operators, Local companies (Dep. Transports, Lazio Region, RSM, Simu, TPL, Car Sharing Companies, Fiab, Enel, Acea)

Other relevant stakeholders

<b>PHASE 3</b>	<b>Planning of measures and promotion of the SUMP proposals</b> • Expert Panel	Timeframe: 6 months
		Cost: € 8.000



#### BASIC COMMUNICATION CHANNELS

mailing list, streaming, web

- Region and municipalities websites
- Social media
- Mailing list
- Social media
- Web Site
- Participatory Mapping
- Surveys

<b>PHASE 4</b>	The interesting discussion about the marketing techniques, the methods to use, the cost and so on was very engaging but unfortunately, joined connection problems of one of the facilitators, it took away a lot of time so group B wasn't able to complete the exercise.	Timeframe: X months
		Cost: €

Figure 10: Module 3 results for the 2nd working group in ROME



Figure 11: Photo from the training session in Rome

### 3.4 Bratislava self-governing Region

Representatives from the Bratislava self-governing region, in cooperation with its stakeholders are currently working on developing a strategic urban mobility plan for the entire Bratislava self-governing region. BSK approved its SUMP in a meeting held on 30 March 2021.

The aim of e-smartec hands-on training in Bratislava was to provide information and tips on marketing techniques, which could be used for involving citizens and stakeholders in developing and implementing SUMP.

In Bratislava, the target audience included the main stakeholders of mobility services.

*Facilitators and participants:* The training was attended by representatives of Bratislavská integrovaná doprava (Bratislava Integrated Transport, Inc.) communication specialists. In total, 4 people participated. None of final participants had been involved in designing and implementation of SUMP, but all participants had experience of working in participative projects and over 60% of participants had experience in applying marketing techniques in their projects.

One working group was created for the purposes of the exercise, while two facilitators and a technical moderator were assigned to the working group. Prof. Tatiana Kováčiková and Dr. Eva Malichova undertook the role of the facilitators, while Dr. Ghadir Pourhashem, senior researcher of ERAдите+ department at UNIZA, was the technical moderator.

*IT facilities:* MS teams and InVision's whiteboard that enables visual collaboration between users in real-time.

Material shared in advance included the:

- (i) agenda
- (ii) practical info for joining the event
- (iii) e-smartec Handbook on success tips on marketing techniques

*Bratislava self-governing region was chosen as the exercise area with following characteristics:*<sup>1</sup>

- The region in which the capital of the Slovak Republic is located
- The area of the region is 2,052.6 km<sup>2</sup>
- Population: 677,024 of which 511,036 inhabitants live in cities and 432 864 are inhabitants of the capital
- The population density for region is 303.4 per km<sup>2</sup> and for Bratislava: 1,177 per 1 km<sup>2</sup>
- Digitization level: high
- Urbanization level: 82 %

<sup>1</sup> <https://bratislavskykraj.sk/spoznajte-kraj/statisticke-udaje/>

The main problems are the growing number of cars, the high number of accidents and the frequency of heavy traffic jams.

### The macro-strategic policy objectives of the Bratislava Self-governing region:

- Increasing number of passengers in the BOD integrated transport system (from 268 in 2019 to 447 in 2050) (in millions)
- Increasing share of public transport use since entering Bratislava when traveling to work (28:72 in 2019 to 48:52 in 2050) (%)
- Expanding network of cycle paths (from 150 in 2019 to 500 in 2050) (in km)
- Increasing share of public transport and active means of transport (walking and cycling) on the way to work (from 42:58 in 2019 to 65:35 in 2050) (%)

Increasing the capacity of the P + R system (688 (124) in 2019 to 2006 (712) in 2050)

The following strategy has been elaborated:

### Strategy for approaching citizens and stakeholders

Facilitator: Eva Malichova  
NOTE KEEPER: Tatiana Kovacikova

WORKING GROUP 1

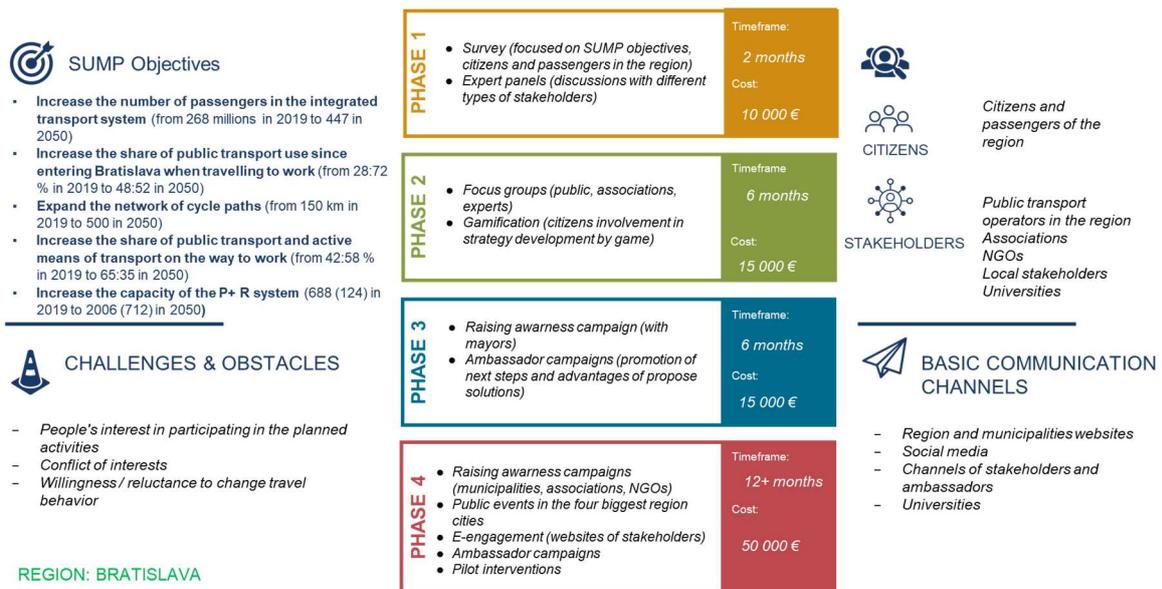


Figure 12: Module 3 results for the 2nd working group in Bratislava self-governing region

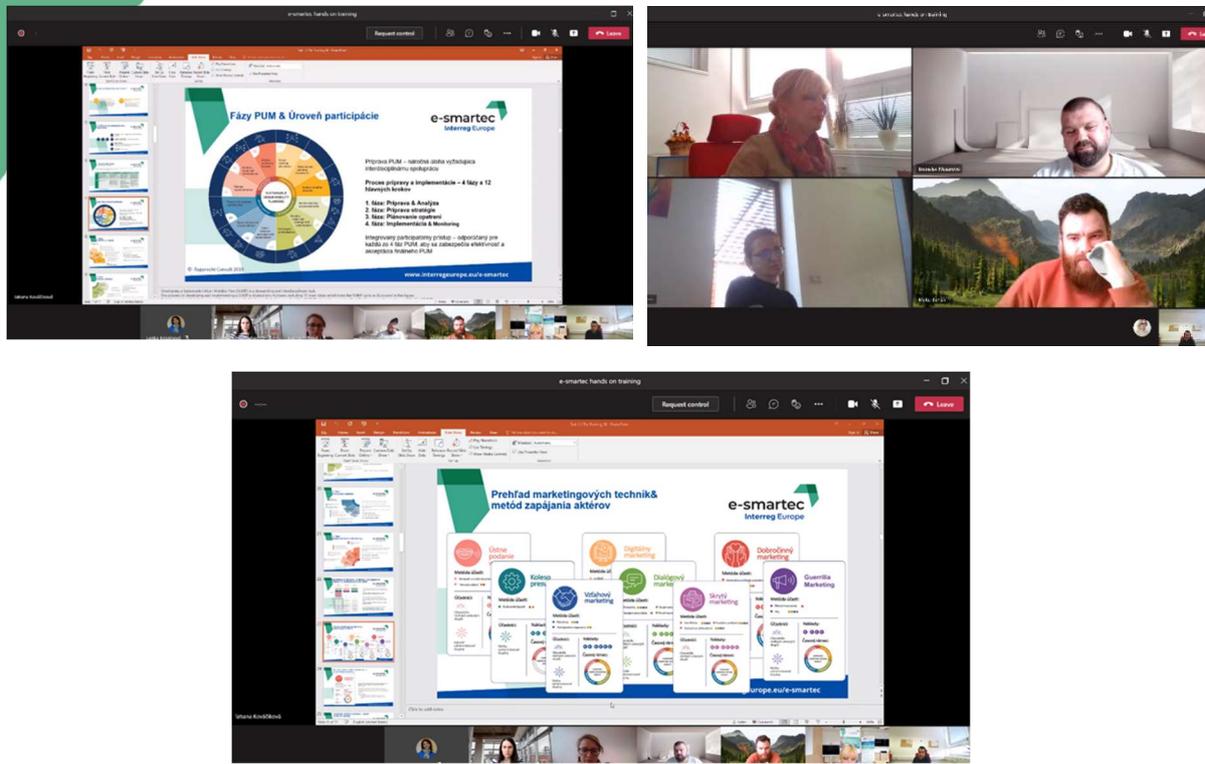


Figure 13: Screenshots from the training session in Bratislava self-governing region

### 3.5 Venlo and Noord-Limburg Region

The regional SUMP of Noord-Limburg – Trendsportal - was drafted and adopted by the eight regional municipalities. Trendsportal is a result of intensive co-operation between the regional municipalities, educational institutions and entrepreneurs.

The objective of e-smartec hands-on training in North-Limburg Regin was twofold: to receive input for the SUMP process and to improve the attendees' professional capacities.

During the training, a real-life example of the partial revision of the regional SUMP of Noord Limburg was used.

**Facilitators and participants:** In total, 10 invitations were sent and 10 people from the region of Noord Limburg attended. All participants had extensive experience in using participation in developing mobility policies. They are quite advanced also as far as the phase to revise the regional SUMP of Noord-Limburg is concerned.

Mr. Dieter Schepers and Mr. Jan Waalen were assigned as facilitators of the two working groups that were created. Both facilitators are experienced mobility policymakers and are highly skilled in participatory policy making.

**IT facilities:** MS teams

Material shared in advance included the:

- (i) e-smartec Collection of Good Practices

- (ii) e-smartec Handbook on success tips on marketing techniques
- (iii) link of e-smartec website [www.interregeurope.eu/e-smartec](http://www.interregeurope.eu/e-smartec)

During the training Venlo used the real-life example of the partial revision of the regional SUMP of Noord Limburg, whose macro strategic objectives are:

- Improving quality of life
- Improving road safety
- Increasing the attractiveness of the mobility system
- Supporting environmental and energy transition
- Improving spatial economic accessibility

In Venlo the attendees were also asked some more specific questions relating to the e-smartec Good Practices, as follows.

*Which practical examples from the presentation, the 'handbook' or the 'good practices register' do you find most interesting and why?*

*If possible, please indicate what you could gain from the practical examples and whether we can use them in the revision of our regional SUMP?*

The trainees provided an extensive list of suggestions, observations and tips to work on.

The roadmap of the participatory procedd was not delivered, nor the check capacity building tol was used, due to advanced status of the SUMP in Noord Limburg. The information were alive and provided in the following picture.

### Strategy for approaching citizens and stakeholders

Facilitator: Jan Waalen  
NOTE KEEPER: Dieter Schepers

#### SUMP Objectives

- Improve quality of life
- Improving road safety
- Making the mobility system more attractive
- Support environmental and energy transition
- Improving spatial economic accessibility

#### CHALLENGES & OBSTACLES

- Create understanding among stakeholders for each other's interests
- Have city councils of eight municipalities set the same goals.
- Transforming good experiences with LIW into sustainable behavior change

REGION: VENLO

<b>PHASE 1</b>	<ul style="list-style-type: none"> <li>• Geographical Survey</li> <li>• Area study</li> <li>• Interviews with stakeholders</li> </ul>	Timeframe: 6 months Cost: € 13.500,-
<b>PHASE 2</b>	<ul style="list-style-type: none"> <li>• Workshop with regional stakeholders</li> <li>• Expert panel meetings</li> </ul>	Timeframe: 6 months Cost: € 4.000,-
<b>PHASE 3</b>	<ul style="list-style-type: none"> <li>• Market day workshops</li> <li>• Online consultation</li> </ul>	Timeframe: 6 months Cost: € 5.500,-
<b>PHASE 4</b>	<ul style="list-style-type: none"> <li>• Nudging interventions</li> <li>• Providing LIW-scans to employers</li> </ul>	Timeframe: 6 months Cost: € 25.000,-



CITIZENS

Inhabitants  
Commuters  
Students  
Visitor



STAKEHOLDERS

Provincie Limburg  
Municipalities  
Business Associations  
Universities and Trade Schools  
Schools  
Mobility Operators



BASIC COMMUNICATION CHANNELS

- Social media
- Trendsportal and municipal websites
- Universities and Trade Schools
- Sports clubs and elementary schools
- Other local channels

Figure 14: Module 3 results for the 2nd working group in Venlo

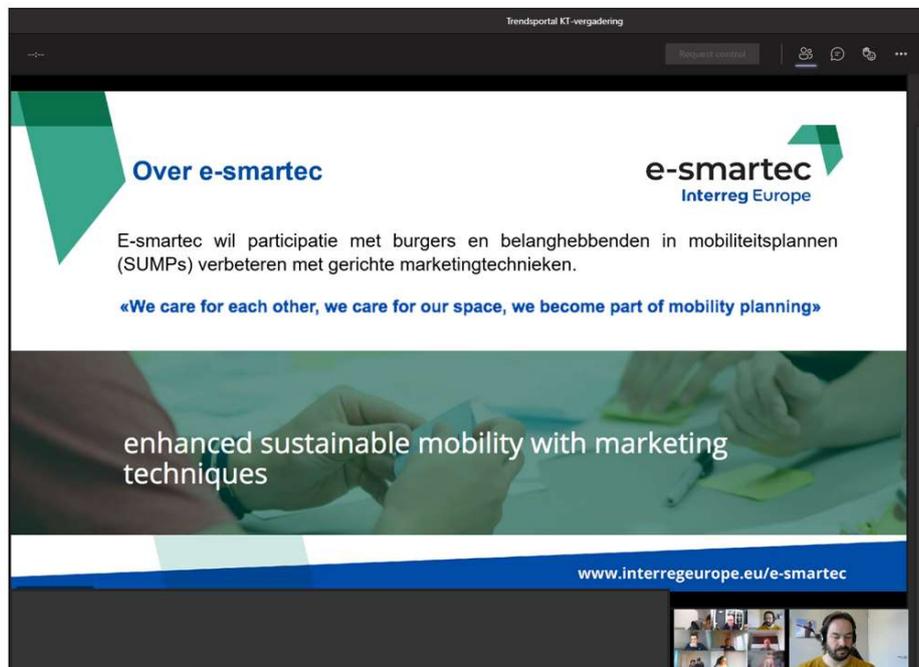


Figure 15: Screenshots from the training session in Venlo

### 3.6 State of Hessen

In the State of Hessen, which started the SUMP process in 2018, various examples of SUMP processes exist. Some municipalities are in an advanced stage with their SUMP's, while others are barely starting. Nevertheless, no matter at what stage of a SUMP process one is working on, staff and stakeholders need to be informed of how to raise awareness on sustainable mobility in public.

The main objective of the e-smartec hands-on training in the State of Hessen was to qualify representatives of Hessian municipalities in using marketing techniques and marketing methods during the implementation of a SUMP.

**Facilitators and participants:** In total, 45 invitations were sent, 13 people registered and eventually 11 of them attended. The participants were from municipalities working in the field of mobility or urban planning, mobility management and climate protection. A lot of them had never worked on a SUMP yet. Some had already worked in participatory processes, some unconsciously, others never. None of the participants had experience with marketing techniques. Almost no one used marketing techniques or methods in projects.

The moderation of Modules 1 and 2 was conducted by the CC-SUM employees working on the e-smartec project. Next to the moderation other CC-SUM team members were asked to support the trainers during the group work in Module 3. The trainers learned independently the necessary contents for the training, and they prepared a briefing for the supporting team members.

In Module 3 of the hands-on training the proposed example of “our city” was used. One macro-strategic policy objective was to: *strengthen citizen participation in mobility planning processes and offer respective capacity building to municipalities.*

In Module 3, the participants were divided into three groups (A, B, C). Only group B managed to develop a participation process for all four SUMP phases. Groups A and C only built up a participation process for the first two SUMP phases.

### Strategy for approaching citizens and stakeholders

Facilitator: Daniela Krebs  
NOTE KEEPER: Susanne Fischell

WORKING GROUP **B**

#### SUMP Objectives

- Reduction in the use of cars
- Increase in bicycle mobility
- Increase the use of public transport
- Encourage rethinking of personal mobility behaviour
- Long-term reduction of private cars in the cities

#### CHALLENGES & OBSTACLES

- Holding on to old habits
- Less interest on the part of citizens and stakeholders
- Change of behaviour
- Political barriers through oppositions

REGION: STATE OF HESSEN

<b>PHASE 1</b>	<ul style="list-style-type: none"> <li>• Awareness-raising campaign with gamification approach</li> <li>• Thematic placement of the topic, but not yet going into too much detail</li> <li>• Neutral experts will be consulted with publicity effect</li> </ul>	Timeframe: 3 months Cost: 15.000 €
<b>PHASE 2</b>	<ul style="list-style-type: none"> <li>• Expert panel and the focus groups are to develop a mission statement in the next step</li> <li>• The two formats are fed back Interaction for the joint development of a mission statement</li> </ul>	Timeframe: 2 months Cost: 15.000 €
<b>PHASE 3</b>	<ul style="list-style-type: none"> <li>• Main element of participation</li> <li>• Action development: public event, workshop, survey, e-participation, map-based surveys</li> <li>• Guerrilla marketing</li> </ul>	Timeframe: 6 months Cost: 45.000 €
<b>PHASE 4</b>	<ul style="list-style-type: none"> <li>• A complementary survey, which is aimed at citizens</li> </ul>	Timeframe: 1 month Cost: 15.000 €



CITIZENS

All Citizens (No matter what personal characteristics the person has)  
Public Experts



STAKEHOLDERS

Local stakeholders  
Universities  
Chambers  
Local companies  
Other stakeholders



BASIC COMMUNICATION CHANNELS

- Social media
- Universities
- Local channels
- Municipal website
- Poster advertising
- Local radio stations

Figure 16: Module 3 results for the 2nd working group in Hessen



Figure 17: Screenshot of the moderators presenting the project

**IT facilities:** The tool used was CME24, which enables online surveys as well as breakout rooms for interactive parts.

Several materials and information were shared in advance sent by post and digitally (Figure 17). These included:

- (i) the agenda
- (ii) e-smartec Handbook on success tips on marketing techniques
- (iii) a short presentation with useful information for the interactive group work
- (iv) notebook and stationery
- (v) marketing cards (provided in **Annex I**, as part of the training material)
- (vi) „SUMP fan”



Figure 18: Photo from the material sent by post in Hessen

## 4. Conclusions

In general, e-smartec hands-on training sessions were a successful experience, despite the impossibility to have vis-à-vis sessions that made communication and the ability to transfer information more difficult.

Municipalities and Councils in metropolitan areas or regions were the main recipients of the learning experience. The regional partners invited stakeholders mainly from the public sector and from institutions dealing with mobility. In some cases, experts in communication, from the respective authorities and institutions, also attended. In general, unless they worked in the communication or had a previous relevant experience, the trainees did not have a thorough knowledge of marketing techniques, although, in some cases, they have applied them unconsciously. It should be stated, though, that the level of in advance knowledge varied from region to region.

To this end, the level of progress of the SUMP in the various regions has strongly influenced the answers to the **ice-breaking questionnaire**. In particular, the scope of action of the SUMP, the objective of “planning for people” and who is involved in the planning was clear only if attendees were already working, or had worked, on SUMP.

*Only if people are directly involved in the implementation of the SUMP they will have clear ideas about the “paradigm shift in urban planning”. It is therefore necessary to continue to carry out training, communication, and dissemination activities on SUMP.*

The knowledge of engagement methods and marketing techniques, on the other hand, is still essentially the prerogative of those who work in the communication sector.

However, *the training has stimulated a great curiosity on the subject even in those who are not really involved in the communication.*

The step-by-step polling activity embedded in the training sessions demonstrated that the theory exposed on marketing techniques was effective, as the participants responded quite correctly to the questions.

*Building the SUMP strategy and the associated engagement roadmap was a complex and challenging job that had to be carried out in a short time, but the response from the groups was articulated and accurate in most cases. The support of the facilitators at this stage was crucial.*

Based on the closing survey, the training was successful in stimulating the curiosity on the topic of participatory planning and spreading it in the participants' institutions. In fact, whenever a closing survey took place at the end of each session, the answers of the participants regarding their intention to change the point of view in their working environment, the topics under question and to transfer the concepts learned, were generally positive.

Based on the same closing survey, participants responded that they got effective insights on the participatory planning process of SUMP. They claimed that the training was relevant to their needs as well. Furthermore, the use of Good Practices to explain the marketing techniques was highly appreciated and considered effective by the participants. The training method used was deemed clear and useful for the work. Some participants responded that they are willing to change their minds regarding the role of participatory methods in planning local mobility, having understood their importance thanks to this training.

In some cases, messages like the one below were left on the chat, making us feel proud of the effort made:

*“The cards on marketing methods and techniques are a great tool and are very well designed. The scope of the training, the number of participants and the training phase were perfect.”*  
(comment from one attendee)

*Impressions, comments, and suggestions from the regional partners are provided below* in hope that it could help improve any training effort in the future.

### *Region of Central Macedonig*

Most of the participants were already aware of the importance and the difficulty of citizens/stakeholders engagement, and the hands-on-training provided them with important knowledge on participatory techniques and tools for all phases of the SUMP cycle.

The two-days seminar format chosen for the implementation of the hands-on-training proved to be effective in achieving its aim, allowing enough time for both theory and exercise, and managing to engage participants, without tiring them.

The COVID-19 circumstances, under which the training took place, revealed the capacity of the stakeholders to utilize ICT tools and solutions for participatory approaches. The tools employed for the training were appropriate to engage participants and transfer knowledge through active participation in the interactive exercise, during which the participants had the opportunity to co-design the SUMP engagement strategy in a scenario of a hypothetical “sample city”, through the use of marketing techniques for each phase of the SUMP cycle.

An important element was the sharing of the individual experiences of SUMP preparation and implementation, which motivates knowledge exchange. Thus, hands-on training could be viewed as a facilitating tool for experiential learning. Furthermore, an important outcome was the necessity of feedback from the Municipalities to SUMP support mechanisms, to better deliver effective help.

Workload and specific circumstances caused under the COVID-19 working restrictions of the Municipalities may have been the reasons for a more limited number of participations in relation to the one observed in similar, physical, events. As the learning experience was highly appreciated by the participants, requests for further undertaking learning activities under this topic were suggested and submitted for consideration to the regional partner.

### *West Midlands*

Most of the participants received effective insight on the participatory planning process of SUMPs and all of them found the training relevant for their needs. All of the participants also changed their mind about the importance of the engagement of citizens and stakeholders in SUMP and will allocate more effort on engagement in mobility planning.

As organizers, our major challenge was to adapt the training to the online format, as well as transferring knowledge without being marketing experts, while also finding and attracting the right people in attending the training.

Despite these difficulties, the vast majority of the participants found the virtual format of the training easy to follow, the duration sufficient and the presented Good Practices useful to increase their knowledge on the engagement methods. In general, the level of interest of the participants was good and the training material sent by email was appreciated.

We feel that the main weakness was the impossibility of delivering the training in person so that people could network more, all exercises could be more active, and we could provide supporting material in paper format.

### *RSM - Rome and Lazio Region*

While the participants to the training did not know what to expect, certainly they were moved by the interest in the SUMP. From our side as organizers we knew that the task was complex, in a short time, remotely and without being marketing specialists we would have had not just to transfer knowledge, but also to intrigue and make our colleagues work on a topic they rarely practiced on.

It turned out that the material and the technique used to present were effective, just like the choice to have several trainers/experts that intervened so that all questions or curiosities could be satisfied on the spot. It was also effective to have the support of an IT technician familiar with the topics covered, and the presence of two facilitators during the exercise phase helped to collect results efficiently. In addition, having examples on Good Practices strongly supported the learning process

The weaknesses were the lack of time and the impossibility of having live contact, therefore not being able to provide support material in paper format. In general, the participants were intrigued by the participatory approach through marketing techniques and would have gladly continued the discussion. The material produced and the methodology could be reused in the future.

### *Bratislava Self-governing Region*

Although the region's representatives were familiar with some marketing techniques, they were not well-acquainted with the possibility of applying them in the first three phases of SUMP planning. Therefore, the training became an opportunity for learning and improving the skills and knowledge of BSk representatives on possibilities of employing marketing techniques in the SUMP.

The only observed weakness of the training was organizing it in the online format. Furthermore, the reduced interaction (i.e. less face to face interaction) with the workshop participants also significantly affected the potential participants' interest to attend the hands-on training. Nevertheless, we consider the training to be successful, as the participants get acquainted with various marketing techniques and possible scenarios of applying them in urban mobility planning.

### *Venlo and Noord-Limburg Region*

In the Noord-Limburg region, the hands-on training was split into two days. During the first day, the theoretical part was discussed and the Handbook and the Good Practices Register were digitally distributed. During the second day, the exercise for the partial update of the regional SUMP of Noord-Limburg was performed. This worked well because it allowed the participants to prepare well for the exercise.

The "cards" showing the different marketing techniques proved to be effective, but would have probably worked even better in a live event. Participants indicated that a better link should be made between the marketing techniques listed on the "cards" and the good practices in the good practice register.

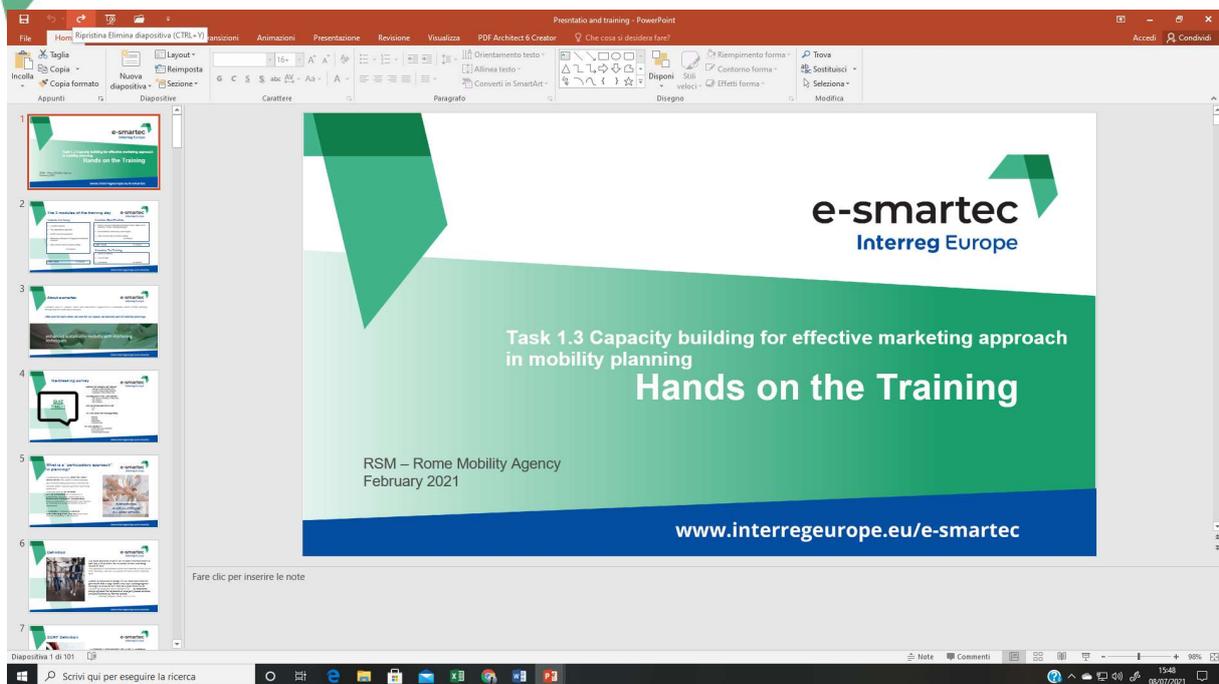
The majority of the participants indicated in the evaluation that thanks to the training their professional capabilities have increased. Some of the good practices discussed during the training will be used to improve the drafting and implementation of the regional SUMP.

### *State of Hessen*

To sum it up, the training in relation to the SUMP advancement was very beneficial to the attending municipalities and to the trainer's experiences. As it is a learning process, the gained experiences can improve future trainings. Possible improvements could include the duration and format (online or on-site) of the training, as well as a reduction of content, for instance in Module 3, focusing on certain aspects instead of a whole city. The participatory process is crucial and all suggestions of how to raise awareness are helpful. Further, it is significant to share these experiences with the other project partners. It must be understood that the training needs adjustments to cultural differences as well.

## 5. Annexes

### 5.1 Annex I: The e-smartec training material

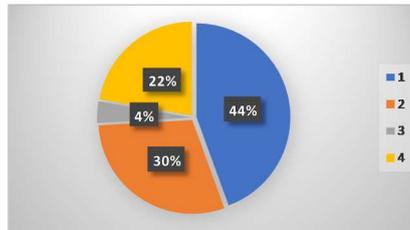


*Screenshot of the presentation given during the training in Microsoft PowerPoint*

### 5.2 Annex II: Spreadsheet for budget simulation – Check Capacity building (exercise)

PHASE 1			Total cost PH 1	€		GROUP 1		
			6	30.000,00				
Citizens	stakeholders		Participation method	Marketing Techniques				
	All	Selected		Word of Mouth	Relationship Marketing	Digital Marketing	Dialogue Marketing	Cause Marketing
				cost				
			Raising awarness campaign	2				
		x	Public event					
			Workshop					
x			e-participation			2		
			e-engagement					
x			surveys				2	
			focus group					
			expert's panel					
			cause campaign					
			cause events					
			gaming					
			pilot interventions					
2	0	1						

Cost monitoring			
Phase	€		%
1	6,0	30.000,00	44,4%
2	4,0	20.000,00	29,6%
3	0,5	2.500,00	3,7%
4	3,0	15.000,00	22,2%
Tot	13,5	67.500,00	100,0%
Residual	4,5	22.500,00	25,0%

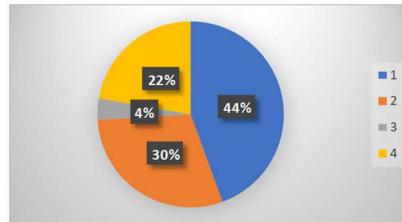


Cost Monitoring for Phase 1 of the SUMP

<b>PHASE 2</b>	Totale cost PH 2	€		Residual cost	€	
		4	20.000,00		8	40.000,00

Citizens	stakeholders		Participation method	Marketing Techniques							
	All	Selected		Word of Mouth	Relationship Marketing	Digital Marketing	Dialogue Marketing	Cause Marketing	Guerrilla Marketing		
				cost							
			Raising awarness campaign								
			Workshop								
			Participatory mapping								
x			e-participation			1					
			e-engagement								
			surveys								
		x	focus group				3				
			expert's panel								
			cause campaign								
			gaming								
			pilot Interventions								
1	0	1									

Cost monitoring			
Phase	€		%
1	6	30000	44,4%
2	4	20000	29,6%
3	0,5	2500	3,7%
4	3	15000	22,2%
Tot	13,5	67500	100,0%
Residual	4,5	22500	25,0%



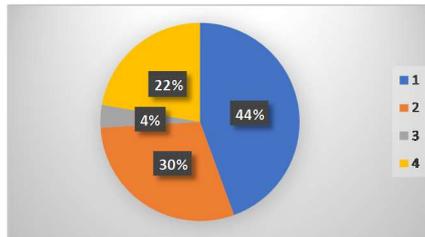
Cost Monitoring for Phase 2 of the SUMP

PHASE 3	Total cost PH 3	€		Residual cost	€	
		0,5	2.500,00		7,5	37.500,00

Citizens	stakeholders		Participation method	Marketing Techniques								
	All	Selected		Word of Mouth	Relationship Marketing	Digital Marketing	Dialogue Marketing	Cause Marketing	Guerrilla Marketing			
			Raising awarness campaign									
			Workshop									
x	x		Participatory mapping		0,5							
			e-engagement surveys									
			cause campaign									
			gaming									
			pilot interventions									
1	1	0										

### Cost monitoring

Phase	€	%
1	6 30000	44,4%
2	4 20000	29,6%
3	0,5 2500	3,7%
4	3 15000	22,2%
Tot	13,5 67500	100,0%
Residual	4,5 22500	25,0%



Cost Monitoring for Phase 3 of the SUMP

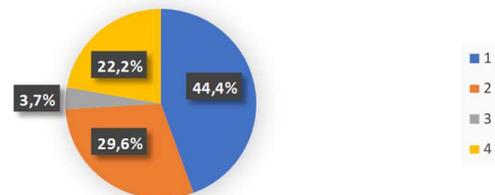


### GROUP 1

#### Cost monitoring

Phase	€		%
1	6,0	30.000,00	44,4%
2	4,0	20.000,00	29,6%
3	0,5	2.500,00	3,7%
4	3,0	15.000,00	22,2%
Tot	13,5	67.500,00	100,0%
Residual	4,5	22.500,00	25,0%

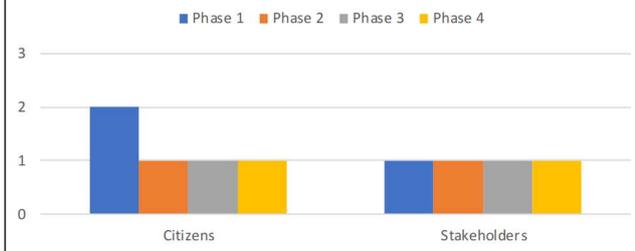
#### Cost per phase



#### Participation method

Phase	Citizens	Stakeholders
1	2	1
2	1	1
3	1	1
4	1	1

#### Number of participation method per phase



*Summary of costs for the whole SUMP cycle*

### 5.3 Annex III: Invitation template, agenda, and ex-ante survey

#### *Invitation letter for training on marketing techniques and participatory process in SUMP*

You have received this invitation because for your position and for your skills you are the right candidate to participate in the training activities on Sustainable Urban Mobility Plans (SUMP), promoted by the European Interreg Project e-smartec. <https://www.interregeurope.eu/e-smartec/>

The SUMP is a long-term strategic planning tool, supported by the European Commission, the Member States and Regions. It provides a multi-disciplinary and participatory approach and operates by placing the citizen and their needs at the center of strategic mobility planning.

The SUMP, in addition to having ambitious objectives, is the tool that will open the doors of financing for infrastructures, as also foreseen by the Recovery Plan. [[https://ec.europa.eu/info/sites/info/files/component\\_clean\\_urban\\_mobility.pdf](https://ec.europa.eu/info/sites/info/files/component_clean_urban_mobility.pdf)].

We offer you a 3-hour course to learn the main marketing techniques and the use of participation tools useful for managing the participatory planning phases of the SUMP.

The course includes a theoretical and a practical part with the possibility of self-assessing your SUMP.

Get familiar with SUMP on the ELTIS website <https://www.eltis.org/mobility-plans/sump-guidelines> .

*AGENDA of the on-line regional events*

**1st Module: The theory**

**60'**

(Plenary)

- The e-smartec project
- The participatory approach
- SUMP's: concept and phases
- Marketing techniques & Engagement Methods overview
- Q&A and on-line polling

*10' coffee break*

**2ND MODULE: THE GOOD PRACTICES PRESENTATION**

**60'**

(Plenary)

- 3 examples of Good Practices on sustainable mobility – practical application of marketing techniques and engagement methods.
- Presenting the Roadmap and the “Cards”
- Q&A and on-line polling

*10' coffee break*

**3RD MODULE: THE PRACTICAL EXERCISE - THE “SOME CITY”**

**90'**

(Groups in breakout rooms)

- Fix the SUMP objectives, set your engagement strategy
- Build up the Cards for each SUMP phase and keep the budget under control;
- Draft your Roadmap
- Q&A and on-line final survey

## 5.4 Annex IV: Polls used during the hands-on trainings

### **POLLS PART 1** (Ice-breaking survey)

- What does the acronym SUMP stand for?
  - Strategy in Urban Mobility Plan
  - Urban Mobility Plan
  - Sustainable Urban Mobility Plan
  
- Engagement procedure in mobility planning refers to the involvement of which of the following in the SUMP procedure:
  - public transport operators
  - local and regional authorities
  - all relevant stakeholders and citizens
  - citizens
  
- In which territorial area is the SUMP implemented:
  - National
  - Regional
  - Metropolitan
  - Local
  - Functional area
  
- The SUMP concerns:
  - Traffic and congestion reduction
  - How people move
  - Public transport increase
  - Increasing parking supply

## POLLS PART 2

(After the module 1)

- Which of the following provides the highest level of participation?
  - Inform
  - Collaborate
  - Consult
  - Involve
  
- Which of the following is not a marketing technique?
  - Word of mouth
  - Cause marketing
  - Public event
  - Wheel of persuasion
  
- Gaming and gamification can be used:
  - In phase 1 – current data analysis
  - In phase 2 – assessment of scenarios
  - In both of the above
  - In none of the above
  
- Which is an ideal scheme of authorities involved in a SUMP?
  - The city – cross-department approach where the SUMP refers.
  - The city – cross-department approach, authorities from neighbouring cities and the Region
  - The department of sustainable mobility / transportation of the respective city
  - The department of sustainable mobility / transportation of the respective city and the city

### **POLLS PART 3**

(after Module 2)

- Which of the following provides the highest level of participation?
  - Inform
  - Collaborate
  - Consult
  - Involve
  
- Which of the following is not a marketing technique?
  - Word of mouth
  - Cause marketing
  - Public event
  - Wheel of persuasion
  
- Gaming and gamification can be used:
  - In phase 1 – current data analysis
  - In phase 2 – assessment of scenarios
  - In both of the above
  - In none of the above
  
- Which is an ideal scheme of authorities involved in a SUMP?
  - The city – cross-department approach where the SUMP refers.
  - The city – cross-department approach, authorities from neighbouring cities and the Region
  - The department of sustainable mobility / transportation of the respective city
  - The department of sustainable mobility / transportation of the respective city and the city

### **RESPOND AGAIN TO THE ICE-BREAKING SURVEY**

(After Module 3 - to assess the knowledge gained compared to the entry level)

**CLOSURE SURVEY FOR PARTICIPANTS**

- Did you get effective insight on the participatory planning process of SUMP?



- Was the training relevant to your needs?



- Were the Good Practices presented useful to increase your knowledge on the engagement methods that can be used during SUMP development?



- Do you think you will transfer the concepts learned to your colleagues?



- After the training, have you changed your mind on how important is the engagement of citizens in SUMP?



- After the training, have you changed your mind on how important is the engagement of stakeholders in SUMP?



- After the training, do you think that you will allocate more effort on engagement in mobility planning?



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# Pilot sites

