Competitiveness Enhancement and Enterprise Development II (CEED II)

# ANNUAL REPORT

## YEAR FOUR, FY2014:
## OCTOBER 2013 – SEPTEMBER 2014

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## ACRONYM LIST

| | |
|---|---|
| APIUS | Patronate Association of Light Industry Companies |
| ASEM | Academy of Economic Studies of Moldova |
| ASW | Association of Small Winemakers |
| ATIC | Moldovan Association of Private ICT Companies |
| B2B | Business-to-Business |
| B2C | Business-to-Consumer |
| BCR | Business Climate Reform |
| BSP | Business Service Provider |
| C&M | Cut and Make |
| CAD | Computer Aided Design |
| CBI | Dutch Centre for the Promotion of Imports from Developing Countries |
| CCENT | Cisco Certified Entry Networking Tehnician |
| CCI | Chamber of Commerce and Industry of Moldova |
| CDCS | Country Development Cooperation Strategy |
| CEED II | Competitiveness Enhancement and Enterprise Development II |
| CFBC | College of Finance and Banking Chisinau |
| CMT | Cut, Make and Trim |
| CNC | Computer Numerical Control |
| COP | Chief of Party |
| COR | Contracting Officer's Representative |
| DCA | Development Credit Authority |
| DCOP | Deputy Chief of Party |
| DO | Denomination of Origin |
| EBRD BAS | European Bank for Reconstruction and Development Business Advisory Service |
| EGC | E-Governance Center |
| EIB | European Investment Bank |
| ER | Expected Result |
| FEPAIUS | Light Industry Association of Romania |
| FOB | Full Own Brand |
| FTA | Free Trade Agreement |
| FVV | National Fund for Vine and Wine |
| GI | Geographical Indications |
| GIZ | Deutsche Gesellschaft für Internationale Zusammenarbeit /German Society for International Cooperation |
| GOM | Government of Moldova |
| ICT | Information Communications Technology |
| IDC | International Data Corporation |
| IT | Information Technology |
| ITE | Information Technology Essentials |
| M&E | Monitoring and Evaluation |
| MAFI | Ministry of Agriculture and Food Industry |
| MEP | Moldova Export Platform |
| MIEPO | Moldovan Investment and Export Promotion Organization |
| MIS | Management Information System |
| MIS | Managment Information System |
| MICT | Ministry of Information, Communications, and Technology |
| MOU | Memorandum of Understanding |
| MWG | Moldovan Wine Guild |
| NetAcad | Cisco Networking Academy |
| ONVV | National Office of Vine and Wine |
| PDO | Protected Designation of Origin |
| PGI | Protected Geographical Indication |
| PIU | Project Implementation Unit |
| PMP | Performance Monitoring Plan |

| | |
|---|---|
| PMU | Project Managements Unit |
| POS | Points of Sales |
| QLab | European Software Institute Eastern Europe Quality Laboratory |
| R&D | Research and Development |
| RCI | USAID Regional Competitiveness Initiative |
| SEE | South East Europe |
| SEED | Sector, Engagement, Enhancement, and Development Fund |
| Sida | Swedish International Development Cooperation Agency |
| SME | Small and Medium Enterprises |
| SW | Startup Weekend |
| TIP | Trade, Investment, and Partnership |
| TR | Technical Regulation |
| TOR | Terms of Reference |
| ToT | Training of Trainers |
| USAID | United States Agency for International Development |
| USG | United States Government |
| USM | Moldova State University |
| USP | Unique Selling Proposition |
| UTM | Technical University of Moldova |
| WCB | Wine Country Brand |

## EXECUTIVE SUMMARY

The USAID/Moldova funded Competitiveness Enhancement and Enterprise Development II (CEED II) project, implemented by Chemonics International Inc. in partnership with Dexis Consulting Group, helps to grow and expand the competitiveness and efficiency of key industries in Moldova leading to increased sales and investment. CEED II supported industries include: apparel; emerging export industries (i.e. automotive parts manufacturing and tourism); fashion accessories; home furnishings; information technology (IT); and wine. CEED II contributes to the economic growth objective and private sector competitiveness program area of the U.S. Foreign Assistance Framework and Development Objective 2, Increased Investment and Trade in Targeted Sectors, of the USAID/Moldova Country Development Cooperation Strategy (CDCS) 2013-2017. CEED II began in December 2010 and will operate until December 2014. It builds upon the successes and momentum of USAID/Moldova's CEED project (2005-2010).

CEED II uses a mix of micro-, mezzo-, and macro-level technical assistance and training activities to boost competitiveness and strengthen targeted industries. CEED II's method of increasing competitiveness is to work with private and public sector stakeholders along industry value chains on the one hand and within broad industry clusters on the other. Value chain activities help increase sales of Moldova goods and services to final markets by eliminating inefficiencies and constrains along the vertical value chain. Cluster activities strengthen horizontal linkages among industry stakeholders by working through industry associations or member-based organizations to advocate for legal and regulatory changes; disseminate information; provide services such as organizing trade and investment missions, trainings, and/or conferences for their members; and coordinate initiatives within targeted industries.

During the past year, Project Year 4 (FY2014), CEED II registered significant progress. It achieved excellent outreach, providing project-related assistance. The Contractor successfully helped to build trade linkages and enhance sales in assisted industries, thus furthering the U.S. Government economic development objectives. To commend the deep and complex assistance, that aligns individual business interests to strategic objectives of the whole industry. In particular, CEED II has managed to develop and launch winning country brands – Wine of Moldova, Din Inima, and Moldova tourism brand, which combined with trade and promotion events in key markets, led to growing country awareness and business sales. During FY14, 170 firms benefited of the CEED II trade capacity building initiatives, including business linkage facilitation and building trade and marketing knowledge. CEED II assisted 116 Moldovan firms to participate at about 40 international and domestic trade fairs, as well as B2B and B2C events, that helped to build client base and grow markets. This also ensured that the assistance is extensive and industry-wide. As a result, 85 firms consolidated their sales in over 10 target international markets, including Western European, such as Italy, France, Belgium for Moldovan fashion manufacturers, and regional ones, such as Poland, Czech Republic and Romania for wine producers. CEED II continued to effectively address the improvement of product quality, so that it is aligned and can compete with the market needs both domestically and abroad. The project has deployed important and profound know-how and knowledge to each assisted industry. This includes know how in fashion design, pattern making and grading, building adventure tourism products, management information systems, merchandising, branding and marketing. This resulted in 170 enterprises were assisted to implement new business and production technologies, that enables them to increase efficiency and manufacture better priced and more competitive products and services.

Additionally, during the past year, Project Year 4 (FY2014), CEED II registered significant progress. It achieved excellent outreach, providing project-related assistance to a total of 298 enterprises; supporting a number of 431 participations of companies in trade shows or B2B events, thereby bringing the cumulative total of participations for all projects years to 1109; and engaging 3,546 people in project activities, such as trainings and workshops, which brings the cumulative total to

12,312 people. Moreover, sales of assisted enterprises grew by 21.62% on average, according to figures reported to CEED II by the companies.

CEED II also excelled at strengthening public-private dialogue to improve the business environment. As a result of project assistance, 262 people participated in activities to improve policy analysis and advocacy (911 people to-date), and 13 consultative meetings between public and private sector stakeholders took place (57 meetings to-date) leading to 9 more actions taken by the Government (37 actions to-date) and aiming to improve the business environment.

While CEED II registered many accomplishments during the year, which are discussed in detail in Sections II and III, selected key accomplishments by target industry are highlighted below.

## Fashion Manufacturing Industry

**Industry grew trade on domestic and regional markets.**

- CEED II supported participation of 24 companies at 9 international fairs. This included tradeshows for manufacturing services in the EU, such as Zoom by Fatex (France), Bijorka (France), as well as the premiere participation of 10 apparel companies under country stand at White Label Exhibition in Germany. Moreover, producers showcased their products and own brands for CIS customers at Leather & Shoes (Ukraine), Textilegprom and Mir Detstva (Russia). As a result the assisted companies increased exports by more than 20% in year 2014 in comparison with 2013. More companies started to export value added services (other than pure stitching) and branded products. In particular, four beneficiary firms increased their own label export share in total export up to 12%. The spring edition of Din Inima/Branduri de Moldova campaign is a continued success. A strong cost-share (35:65%) between CEED II and 25 participating brands demonstrates sustainability and commitment. The campaign resonated strongly with the Moldovan consumers, through outdoor, internet and other media channels. Popularity of Moldovan brands continued to grow, an immediate result being increase in sales more than 43% in year 2014 in comparison with year 2013. Since its start in 2012, the Din Inima campaign contributed to 7.4 mln USD of new sales for the participating companies, and triggered groundbreaking positive changes in Moldovan consumers and fashion manufacturers.
-

**Companies registered sustained increase in product quality through better branding, know-how in design and IT solutions.**

- 29 apparel, footwear and fashion accessories companies improved product design through the “flying designers” assistance, an intensive 5-day training for pattern making and grading, and workshops about the 2015 season trends in colors & shapes. CEED II continued to build merchandising, production planning, and stock control skills through dedicated trainings.
- With CEED II support, 18 companies improved the quality of fabrics by visiting the largest raw materials exhibitions (Premier Vision and Texworld) and warehouses in Turin, Italy.
- Six more companies were assisted to develop new up-to-date brands, namely Vasconi persona, Shram, Sandi, La Tyana, Hincu, and Ana Popova. Since its start, CEED II supported 40 manufacturers in their [re]branding efforts, creating the backbone of Moldovan fashion industry and a shift to value added.
- Another pilot effort for using IT solutions to improve economic efficiency in apparel industry was completed. With CEED II assistance, the apparel company Maicom implemented a Management Information System (MIS) to improve manufacturing efficiency. As an immediate result, Maicom was able to reduced stocks of finished goods by around 18% due to speeding-up of information processing and increased its productivity by around 12%, through accelerating information flow, eliminating redundancies, and improving efficiency of decisions related to production and finance. This example will serve as inspiration to other companies.

**With CEED II support, APIUS made important institutional changes contributing to its sustainability.**

- Organization of exhibitions and fashion shows, as well as the common promotional campaign Din Inima consolidated APIUS and delivered value to its members. During one year 21 new companies became APIUS members, current membership exceeding 90 companies and transforming APIUS into the one of the largest industry associations.

## Home Furnishings

In December 2013, CEED II work in Home Furnishing Industry has ended, after two and a half years of dedicated assistance. The project has successfully facilitated impactful changes, most notable being the creation of Association of Furniture Producers, the first common furniture shopping centre Mobimall that is managed through joint partnership between the investor and association, as well as improved design and branding for furniture manufacturers. The main accomplishments of CEED II in this sector are shortly described below:

- The most impressive result of CEED II support was the creation of MOBIMALL, the first furniture shopping mall in Moldova. The project was instrumental in identifying this gap on the market, and had the important role to mobilize the furniture producers to implement the great idea, to assist in the investor identification, to consolidate the developed relations between the parties involved as well as to support MOBIMALL launch and promotion. MOBIMALL was successfully launched on August 15, 2013, after almost 2 years of committed work, gathering under one roof 20 furniture brands and 3,000 furniture and home products on nearly 15,000 square meters. From its concept to the launch, private furniture manufacturer, Iurie Bors made a 2 mln Euro investment, being motivated to extend the created mall by 5,000 additional square meters of retail space in 2014. CEED II placed special emphasis on sustainability in its approach.
- CEED II helped to launch and strengthen the young Association of Furniture Producers to become operational, to demonstrate its value and to build its institutional capacity. By the end of CEED II assistance, the association became a fully functioning and vibrant body consisting of 17 dues-paying members, having in place an Administration Council, an Executive Director, an office and an activity plan. CEED II placed special emphasis on sustainability in its approach. The project helped the Association to further consolidate its membership, and by attributing it a critical role in the management/marketing of Mobimall, CEED II ensured motivation and value for its members.
- CEED II offered design and branding assistance to furniture producers, managing to change in this way industry thinking and demonstrating the value for better product design and marketing. The project assisted 9 furniture producers to rebrand on the local market, thus improving their image to customers, and supported 5 design projects to help furniture producers, to develop new collections. Assisted companies noted an improved perception by customers and better sales as they start to promote and position themselves more professionally. This motivated the companies to invest more in professional promotion. For instance, Stejaur invested €4,000 in follow-on TV promotion and point-of-sale marketing, while Panmobili invested €1,000 in banners and metallic labels with new logo that are applied on furniture.

## Information and Communication Technology (ICT)

**CEED II continued to build ICT skills in line with industry needs.**

- IT Essentials (ITE) expanded as an optional course in high schools. 62 schools were added, 75 teachers were trained, and around 2,600 students have enrolled for ITE courses. Since the start of ITE initiative, over 3700 students were enrolled from 123 institutions from Chisinau and the regions. In premiere two largest IT companies - Endava and Cedacri - hosted an open-door event for best 60 ITE students and graduates from rural areas, showcasing the benefits of working in an IT company. Several ITE teachers successfully passed CCENT certification, and will offer advanced networking administration courses to their students,

thus contributing to practical ICT skills development. Consequently, 6 new local Cisco Academies were created.

- Joint efforts of CEED II, ATIC, Ministry of Education, NGO Robootika from Estonia and other partners helped pilot 6 Robotics clubs, based on the Lego Education program. A private partner - Starnet – joined and purchased robots for 2 schools. Since June 2014, 170 children already enrolled. Robotics is an innovative way to learn programming.
- CEED II supported the Ministry of Education to update the national Informatics curriculum for the lower and upper secondary education. The new curriculum is more relevant and attractive, in line with students' learning capabilities and industry needs. 60 schools are piloting the new curriculum since September 2014.
- CEED II facilitated conceptualization of a PPP between Government, Microsoft, IBM, and USAID for creation of national IT Centre of Excellence (ITCE), aimed to improve ICT skills and technology entrepreneurship among youth. ATIC was assisted to develop capacity as a potential ITCE implementer.
- In its fourth edition, ICT Career Orientation Days**,** unfolded at three institutions, Technical University, State University and Academy of Economic Studies. Over 1,000 students met directly with representatives from nine largest ICT companies, learning first-hand about a successful ICT career and expectations from prospective employers. ICT career promotion campaign reached over 2 millions of people, with broadcasting on 4 TV channels and 7 popular websites. 6 success stories in IT and a series of 21 editorials were produced and published on high traffic websites.

**The technology entrepreneurship community was strengthened.**

- CEED II successfully supported the 5th edition of Startup Weekend Moldova (SWM) on November 15-17, during the Global Entrepreneurship Week. The event gathered 80 participants, 9 coaches and 7 judges from 8 countries: Moldova, Romania, Russia, Czech Republic, USA, UK, France, and Lithuania. Such events are critical for building the startup mentality and community.
- To support the enthusiasm of the young startup community, CEED II organized a series of workshops for aspiring tech entrepreneurs entitled "The Startup Roadmap - Explore, Design, Build, Grow", facilitated by Daniel Ray, serial entrepreneur and investor from US, based in Lithuania.
- CEED II joined efforts with Peace Corps volunteers and organized Technovation Challenge in Moldova. The Moldovan team was selected in the Top 10 finalists for World Pitch event in U.S., and won the 1st prize. The success of Technovation Challenge 2014 will strongly motivate a larger number of young women from Moldova to enter the next year's competition, and the quality of projects will increase. IT startups and career were promoted among young women. Besides, Moldova had exposure at the very core of global tech entrepreneurship.

**The regional positioning of Moldova's IT was consolidated and industry strategy defined.**

- To build trade linkages, promote Moldova as an IT destination, and explore ideas and opportunities for developing the ICT ecosystem in Moldova, CEED II supported a (i) study visit to Armenia, (ii) presentation of Moldova at a specialized B2B event in Kista, Sweden, aimed to help develop business opportunities between potential Nordic customers and IT companies from SEE countries; and (iii) participation at CeBIT exhibition, which took take place in Hanover, Germany.
- The Moldova ICT Summit 2014 was a success. CEED II helped facilitate valuable sessions for entrepreneurs, through How to Web (Romania), that raised the profile of the event. The Summit was attended by around 1000 people and 70 speakers from 20 countries.
- CEED II supported the Ministry of ICT to finalize the legal and regulatory package aimed to raise competitiveness of ICT industry. The package was put up for public and Government review beginning of May. This package set up the strategic framework for development of a competitive ICT industry, through the following legal/regulatory initiatives: the IT Industry

Competitiveness Strategy, creation of an ICT Agency for implementation of public policies in ICT, a draft law on IT Parks that contains a "single-tax" model to streamline the tax regime for ICT companies.

## Emerging Export Industries / Tourism

**Inbound tourism association capacity was consolidated.**

The newly founded National Inbound Tourism Association of Moldova (ANTRIM) started to fully activate and shortly became the main and most active association promoting Moldova as a tourism destination. CEED II helped to build capacity, with professional web-site www.antrim.md, taking leadership in organization of activities, such as trainings, promotional events in Germany, Sweden and UK – Experience Moldova, "Green Run", and Hello Chisinau free maps.

**Tourism linkages and country awareness were built for Polish, British, Swedish, UK and German markets, as well as domestically.**

Joint tourism tours were built for Polish tourists. The leading tour operators exhibited at Tour Salon Poznan, Poland, in October 2013. Poland is a target market for Moldova's wine and rural tourism offer. Companies sold joint tours for Moldova –Ukraine.

- Moldova builds awareness for German consumers. 4 Moldovan tour operators exhibited at CMT in Stuttgart, Germany in January. CMT is the biggest consumer tourism exhibition in the world with a record number of 241,000 visitors in 2014. For the second time with CEED II support a dedicated press conference was successfully organized for 20 travel journalists from popular travel magazines.
- Dedicated press conference at ITB Berlin 2014 held in premiere. CEED II supported a premiere press conference, dedicated to Moldovan tourism, at ITB Berlin, the most important B2B event of the tourism industry. Over 30 journalists participated. As a result, Chateau Vartely established contacts with German, Romanian, Slovak, Polish tour operators, while Tatrabis sold tours to 6 tourist groups.
- CEED II supported three promotional Ethnic Moldovan Music concerts in target European markets – Great Britain, Germany and Sweden. Over 700 people, representing media, opinion formers, potential tourists, got acquainted with Moldova as tourism destination.
- Tourism companies extended or created new partnerships with 7 foreign tour operators from target markets, through CEED II-supported familiarization tours.
- A Facebook competition ran on Moldova Holiday website targeted to UK market. The advertising reached 29,371 people, and social media itself reached 123,000 people. The winners, Olley family visited Moldova in April, deeply impressed by Moldova's authentic tourism.
- In premiere, wine trips during National Wine Day were successfully organized, to promote wine tourism for local and foreign visitors of the festival. As a result, 700 people visited Cricova, Milestii Mici, Vartely, Purcari, Branesti and Migdal-P wineries paying prices ranging from 115 to 160 MDL.

**National tourism identity was initiated through public-private partnership, while Moldova Holiday was improved and pending status of national tourism website.**

- CEED II initiated the tourism country brand development, along with a Marketing Strategy and Promotion Plan. This will set the foundation for a coherent country positioning and promotion of the Moldova's touristic offer abroad. Launch is expected in fall 2014. CEED II supported the development of the country promotion video that was originally developed by NTA, being strongly criticized by the private sector. The new spot was featured on 15 TV and online, and Youtube.
- Moldova Holiday (MH) website is pending status of national tourism website**.** CEED II is facilitating a premiere joint partnership between NTA and ANTRIM for management of the website. The website was subject to technical upgrade to improve design and functionality. CEED

II attracted French Alliance and GIZ to add French and German languages, leveraging resources. A MoldovaHoliday mobile application is underway to be launched in 2015.

**New tourism products were successfully developed and promoted, raising competitiveness of Moldova's tourism offer**

- The two-day New Product Development & Market Leadership Positioning workshop taught how to turn creative ideas into desirable, distinctive, market ready tourism products. Companies started to sell distinctive experiences. For instance, Tatrabis launched "Ideas for weekend" for local market, while Explore Moldova launched a tour for adventure tourism "Trojan's wall and Lower Prut" in May. Finally, Mimi winery is being coached how to develop a wine chateau in an innovative way.
- The second edition of Green Run event was held in Rezina district, with 70 racers and over 400 people who enjoyed local cuisine, handicraft exhibition and concert with local artists.
- CEED II supported the launching the first touristic trolley on August 27. The tour trolley had 28 excursions during 8 days of weekend and had 500 people participating in the tours. Discussions were launched to find a long-term solution as the project was very well received and people are looking for continuity.

**Wine**

The year 4 activities are part of the final stage of the implementation and consolidation of the wine sector reforms promoted during the year 2-3 of the project, and namely:

- **The institutional establishment, successful start-up and consolidation of the National Office for Wine and Vine**: the new model of public-private administration of the wine industry has been tested in practice and it has shown its viability. The sustainability of the institutional and operational reforms are ensured by : the new law on vine and wine; the government decisions on the ONVV Statutes and the Fund of Wine and Vine, which is securing the resources for the ONVV activities.
- **The international and national launch of the wine country brand program "Wine of Moldova. A Legend Alive**": the complex sectorial promotion policies(Marketing & Promotion Framework; annual marketing plan; brandbook; communication strategy, sustainability framework and the legal&enforcement concept) represented symbolically by a national wine symbol&slogan are the key framework for an efficient generic promotion of the wines of Moldova and a sustainable development of the export markets and growth of sales. A web-site, a design&presentation kit and content for Wine of Moldova program has been developed with support from CEED II.
- **Unprecedented international awareness and intensive PR&trade activities for Wine of Moldova :** The project supported significantly the organization of more promotion activities than ever, which helped tremendously the wine sector to re-direct their wine exports to new markets, in the conditions of a new Russian embargo, imposed an embargo in September 2013. Wine of Moldova has been promoted throughout 12 complex trade activities and PR campaigns in 5 target markets and on international arena. The bottled wine exports to EU grew in the first 8 months of 2014 with 20 %, while the total wine exports to EU increased by 9%.
- **Assisted wineries increased sales and penetrated new markets:** In result of the CEED II supported promotion activities during the last years, the wineries continue achieving new sales increase, sign new contracts and penetrate new markets and segments. Such increases of 20-30% are declared by the wineries, and new incomes of several hundred of thousands of dollars. Chateau Vartely, Asconi, Fautor, Migdal-P, Gitana winery, Et Cetera, Mezalimpe, Purcari, etc. are only some of the project clients that have announced about such progress.
- **Improved concept and organization of the National Wine Day:** After four years of a very crowded and incoherent Wine festival, the event was brought back to the capital center and included new elements: Wine School, Wine Road, PGI promotion; new brand and wine glasses

for consumers. About 80 thousand wine bottles have been sold during the two days of the fest, to the 150 thousands visitors, among which some 3000 tourists.

- **Extensive wine culture activities on the domestic market**: CEED II further assisted the development of such efficient wine culture activities as: the bi-annual Wine Vernissage; two editions of the Wine School; the accredited Sommelier courses; wine tourism and PR activities – organized on the local market. These activities are on a growth trend and benefit of high interest from the young and emerging social classes.
- **Continued regulatory initiatives**: the project assisted continuously the wine sector and the ONVV in formulating its positions and in promoting them by the government authorities, namely the Technical Regulation, including the regulation model for the PGI/PDO wine production system;

**Cross-cutting Finance & Investment Activities**

- CEED continued to **support USAID's DCA Loan Guarantee Program**. CEED II focused on ongoing communication with and provided advice to financial institutions implementing the DCA activities. Two meetings with the Comertbank and Rural Finance Corporation management were organized in order to discuss the status of the DCA guarantee, ways to improve DCA utilization and/or clarify the factors hindering the DCA activity performance. As result, by September 30, 2014, 40 loans in total amount of $1,305,000 were placed under the USAID Guarantee that is twice better achieved result compared to the period September 2011- September 2013, when 20 loans in total amount of $614,500 were placed.

- A **new DCA activity was launched**. USAID/Moldova entered into a co-guarantee partnership with SIDA supporting access to finance for implementation of energy efficiency activities for SME and individuals. The proposed guarantee is a 15-year $3.5 million signed with Prime Capital. CEED II is the assisting partner and provided support to the official launch of the new DCA activity organized on June 17,2014 as well as advice on activity implementation. Under new DCA in energy efficiency purpose, during July-September 2014, Prime Capital placed 11 loans (total utilization of $115,625, which represents 3.28% utilization rate), all of them being taken by individuals for residential improvements with energy efficiency impact.

- CEED II continued its **assistance related to the EIB credit line of €75 million that has been allocated for the production of GI/PDO wines** CEED II supported the **development of an investment plan for Divib Media** LTD winery. The intention is to plant 20 ha of technical vineyards (8 different types) in Criuleni area under the ECO label. The investment plan is also incorporating the vineyard plantation plan. The total volume of the investment project is 354,000 EUR. The winery is ready to come up with 204,000 EUR own contribution. The development of the investment plan was needed first of all to understand the volume of resources to be invested in the plantation.

THE IMPACT OF

# USAID
FROM THE AMERICAN PEOPLE

# Moldova Information Technology Industry

## Roadmap to Competitiveness

**$600** million ICT industry size in **2012**

**20,000** people Largest youth employer

Fastest growing industry

**10** fold IT export growth in **10** years

Enabler for economy and society

## USAID CEED II* key impact

Adapted education to industry needs

Positioned Moldova as IT destination

Achieved shared vision and better environment for ICT industry

Built stronger IT startup community & idea-sharing culture

ICT Career Roadshows

**5** years | **85** universities & schools | **25** private companies partnering | **4,500** youngsters

Innovational ICT Excellence Centre underway

Partnership with Government, Microsoft, IBM

**$2M** leveraged investment | **1,000+** future beneficiaries per year

**Boosted interest and enrollment for IT careers**

**Adapted education to industry needs**

**Pioneered new IT technologies**

**Engaged private sector in education**

School IT curriculum upgraded

IT Essentials course introduced as elective & optional

Robotics Clubs pioneered

**180** teachers trained | **4,000** children enrolled | **165** schools engaged | Partnership: Cisco, IBM, Microsoft

**Nurtured IT entrepreneurship**

**Built strong IT community & idea-sharing culture**

**Connected Moldova to global startup community**

Introduced innovational startup events Startup Weekend, Launch48, Garage48

**10** events | **400** participants | **14** private sponsors | **4** successful startups

**Achieved shared vision for ICT industry**

ICT Policy White Book by private sector

National ICT Competitiveness strategy

**Improved business environment**

Fiscal incentives for ICT employers

IT Parks draft Law

ICT Development Agency concept

**15** Government actions to improve business environment

**Improved access to finance & increased lending to IT industry through USAID DCA guarantee program**

**$1.2M** loan portfolio guarantee program through Prime Capital

**Raised industry voice**

Strengthened ICT Business Association (ATIC)

**30** member companies and growing | **4** times revenue increase in 4 years | **20** position papers issued | **10,000+** people as direct beneficiaries

**Positioned Moldova as competitive IT destination**

Ranked Moldova ICT industry by global IDC

Promoted effective country positioning in IT services

**Grew awareness locally and regionally**

National ICT business portal with 215 registered companies

B2B events in Romania, Sweden, Armenia

Raised Moldova ICT summit into largest industry event

Over **1,000** participants annually | **5** editions | **250** speakers from **50** countries | Funded by sponsors & Government

* USAID Competitiveness Enhancement and Enterprise Development II (CEED II) Project targets the Apparel, Footwear & Accessories, ICT, Furniture, Tourism and Wine industries. USAID CEED II increased competitiveness by enhancing quality, increasing trade and investment and improving public-private dialogue for a better business environment.

## SECTION I

# Project Overview and General Approach

Chemonics International Inc. (Chemonics) is pleased to submit to the United States Agency for International Development in Moldova (USAID/Moldova) this Year 4 Annual Report for the Competitiveness Enhancement and Enterprise Development II (CEED II) project. This report covers the twelve month period from October 2013 through September 2014.

### A. General Overview

CEED II is a four and a half year project (December 2010 – June 2015) funded by USAID/Moldova. CEED II contributes to the economic growth objective and private sector competitiveness program area of the U.S. Foreign Assistance Framework and Development Objective 2, Increased Investment and Trade in Targeted Sectors, of the USAID/Moldova Country Development Cooperation Strategy (CDCS) 2013-2017. CEED II builds upon the successes and momentum of CEED (2005-2010). The project's purpose is to grow and expand the competitiveness and efficiency of key strategic industries in Moldova leading to increased sales and investment. CEED II's develop hypothesis is that by helping Moldovan enterprises in key industries compete successfully at home and abroad it will lead to increased sales and investment. CEED II complements and supports the Government of Moldova's strategy of export- and investment-driven growth. The project aims to increase competitiveness in six targeted industries through activities in three components:

- Component 1: Increased productivity
- Component 2: Increased trade and investment
- Component 3: Improved public-private dialogue for a better business environment.

CEED II targets six industries – apparel and textile, fashion accessories, home furnishings, information technology (IT), tourism (as an emerging industry), and wine. We will support these industries so that they reach a maturity level that promotes sustainable improvements in sector competitiveness and that provides well-paying and desirable jobs, hereby increasing incomes, alleviating poverty, and reducing emigration.

### B. Overview of Activities and Expected Results

CEED II provides technical assistance, training, and other support, including limited co-financing, in order to implement activities in the following areas across CEED II's targeted industries:

- Improve technologies and business processes
- Develop the capacity of the workforce
- Develop the capacity of industry service providers and other value chain actors
- Improve the quality of products and services produced by enterprises
- Position and promote products and services in strategic markets
- Improve access to financing and investment by enterprises
- Increase the viability and number of associations and member-based organizations
- Develop the capacity of the private sector for advocacy and policy analysis
- Increase public sector understanding of private sector concerns and actions taken to improve the conditions for targeted industries

The aforementioned activities will generate the following results:

- Enhanced competitiveness of the targeted industries
- Increased sales in assisted enterprises by 50 percent over the life of the project
- Increased investment in assisted enterprises by 75 percent over the life of the project
- Increased productivity and workforce capacity in assisted enterprises
- Increased sales to new and existing markets for assisted enterprises

- Improved the business environment and public-private dialogue in the targeted industries.

The project's activities and performance monitoring system are connected by the CEED II Results Framework shown below in Exhibit I-1. The results framework guides our choice of activities and also provides a structure around which we monitor our performance using 21 indicators. The final *Performance Monitoring Plan* was approved by USAID/Moldova on March 7, 2011 and amended on March 21, 2012 to correct several problems that were identified during implementation. These indicators and their associated annual and life-of-project targets and actual results for Years 1-4 are listed in the table shown in Appendix I&II.

### Exhibit I-1: Results Framework

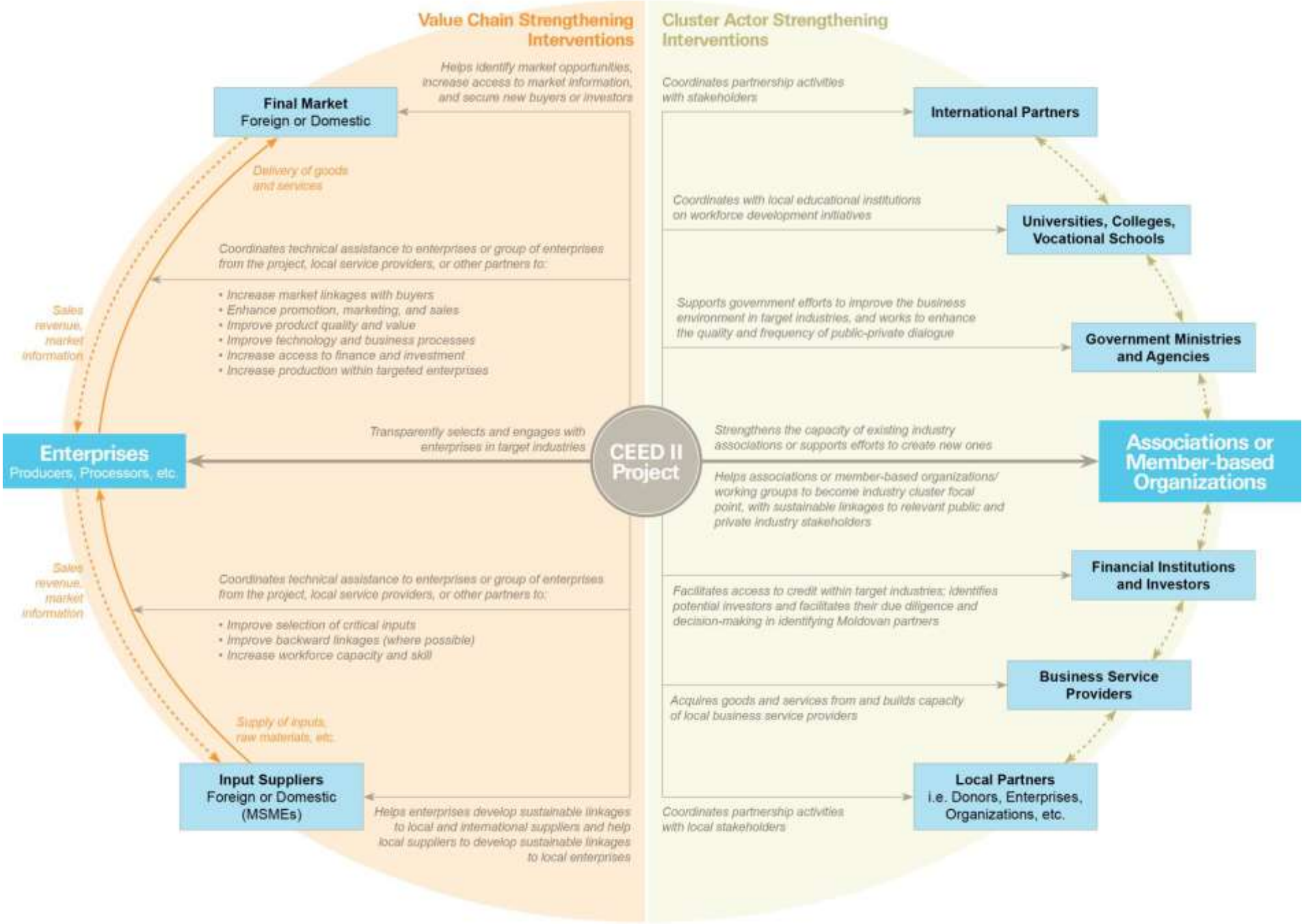
## C. General Approach to Project Implementation

During Year 4, CEED II continued to employ a mix of micro-, mezzo-, and macro-level technical assistance and training activities to boost competitiveness and strengthening targeted industry clusters. The CEED II approach to increasing competitiveness is to work with private and public sector stakeholders along target industry value chains on the one hand and within broad industry clusters on the other. Value chain activities focus on increasing the sale of Moldova goods and services to final markets by eliminating inefficiencies and constrains along the vertical value chain. Cluster activities aim to strengthen horizontal linkages among industry stakeholders by working through industry associations or member-based organizations. These actions create a supporting and sustainable environment in which targeted industries can develop, as illustrated in Exhibit I-2 on the next page.

Enterprises from within targeted industry value chains and associations and member-based organizations are the project's main beneficiaries. By supporting target industry enterprises, selected as outlined in the box below, we affect positive changes in product quality, production processes and technology, and commercial knowledge and skills to allow companies to increase their ability to sell their products and services profitably in international markets over sustained periods of time.

By working with associations and member-based organizations we build their capacity to advocate for legal and regulatory changes; serve as clearinghouses for information; provide services such as organizing trade and investment missions, trainings, and/or conferences for their members;

**Exhibit I-2**


Value Chain Strengthening Interventions
Cluster Actor Strengthening Interventions
Helps identify market opportunities, increase access to market information, and secure new buyers or investors
Final Market
Foreign or Domestic
Delivery of goods and services
Coordinates technical assistance to enterprises or group of enterprises from the project, local service providers, or other partners to:
• Increase market linkages with buyers
• Enhance promotion, marketing, and sales
• Improve product quality and value
• Improve technology and business processes
• Increase access to finance and investment
• Increase production within targeted enterprises
Sales revenue, market information
Enterprises
Producers, Processors, etc.
Transparently selects and engages with enterprises in target industries
CEED II Project
Sales revenue, market information
Coordinates technical assistance to enterprises or group of enterprises from the project, local service providers, or other partners to:
• Improve selection of critical inputs
• Improve backward linkages (where possible)
• Increase workforce capacity and skill
Supply of inputs, raw materials, etc.
Input Suppliers
Foreign or Domestic
(MSMEs)
Helps enterprises develop sustainable linkages to local and international suppliers and help local suppliers to develop sustainable linkages to local enterprises
Coordinates partnership activities with stakeholders
International Partners
Coordinates with local educational institutions on workforce development initiatives
Universities, Colleges, Vocational Schools
Supports government efforts to improve the business environment in target industries, and works to enhance the quality and frequency of public-private dialogue
Government Ministries and Agencies
Strengthens the capacity of existing industry associations or supports efforts to create new ones
Associations or Member-based Organizations
Helps associations or member-based organizations/ working groups to become industry cluster focal point, with sustainable linkages to relevant public and private industry stakeholders
Financial Institutions and Investors
Facilitates access to credit within target industries; identifies potential investors and facilitates their due diligence and decision-making in identifying Moldovan partners
Business Service Providers
Acquires goods and services from and builds capacity of local business service providers
Local Partners
i.e. Donors, Enterprises, Organizations, etc.
Coordinates partnership activities with local stakeholders

and coordinate initiatives within targeted industries. All of these activities help to build and strengthen networks within the industries, which can lead to new alliances and partnerships at home and abroad. In short, we will help associations to become focal points for industry cluster development.

Since the number of targeted industry associations and member-based organizations is limited, we try to work with as many as possible, reaching out directly to associations' leaders to discuss opportunities for CEED II assistance. In cases where associations do not exist, we follow the model used on CEED, where we sought to create conditions (incentives) to encourage associations to develop from the bottom up with industry stakeholders leading the process. The project serves as a facilitator, champion, and coach, but does not create the organization ourselves.

Although we will build on many successful CEED activities, our approach to CEED II focuses more on systemic and sustainable activities. For example, to strengthen industry clusters, we take a more holistic view of cluster development with an increased focus on non-value chain actors, such as associations and BSPs. Our approach on CEED II offers an intensified focus on partnerships, public-private dialogue, and industry-wide interventions to encourage systemic and sustainable change.

**ENTERPRISE SELECTION & ENGAGEMENT**

**Participant Enterprises**

***Definition and engagement:*** Enterprises participating in project-sponsored trainings, seminars, roundtables, and similar activities targeting a wide audience and/or members of CEED II-assisted associations or organizations.

***Selection criteria:*** Self-selecting; willingness to invest time in project- sponsored events (satisfying cost-sharing arrangements as required) and to remain in good standing with project-assisted organizations.

**Client Enterprises**

***Definition and engagement:*** Enterprises receiving customized firm-level assistance or participating with smaller groups of enterprises in intensive project sponsored initiatives related to productivity enhancement, trade and investment promotion, workforce development, etc.

***Selection criteria:*** Self-selecting, with the following other requirements:

- Legally registered enterprise within a targeted industry and (as required for particular activities) a member of the industry association
- Strong commitment by management to reform their business practices, pass on lessons learned, and cost-share for activities
- Strong market presence in local or international markets or possessing potential to increase exports or local sales
- Strong potential to expand or develop extensive forward and backward value chain linkages to other Moldovan enterprises
- Strong potential at reasonable cost for technology of management system improvements to increase sales or enhance productivity.

## D. Staffing

The CEED II staffing plan, Exhibit II, is shown on the adjacent page. Chief of Party (COP) Doina Nistor leads the CEED II team, providing the vision, leadership, management, and overall technical direction of the project. He is aided by Deputy Chief of Party (DCOP) and Wine Industry Advisor Diana Lazar.

The COP and DCOP share oversight of project activities. Ms. Nistor oversees activities in the IT, home furnishings, apparel and fashion accessories industries. She also supervises the M&E Manager, Finance & Investment Advisor and Communications Advisor. Ms. Lazar is responsible for wine industry and oversees the activities in tourism, as emerging export industry.

Project staffing during Year 4 evaluated in the way described below.
Ionela Ciuhrii-Titirez, ICT Manager, returned from maternity leave on October 2013 on part-time basis, the management of the ICT industry being currently shared with Doina Nistor, COP.

Ruxanda Cheibas, Financial and Administrative Manager, returned from maternity leave on October 2013 and undertook the Monitoring and Evaluation Manager position. Initially, this task was part of Doina Nistor responsability in her quality of DCOP. Due to the fact that in August 2013, Doina Nistor

undertook the position of COP, the responsabilities related to M&E activities were undertaken by Ruxanda Cheibas.

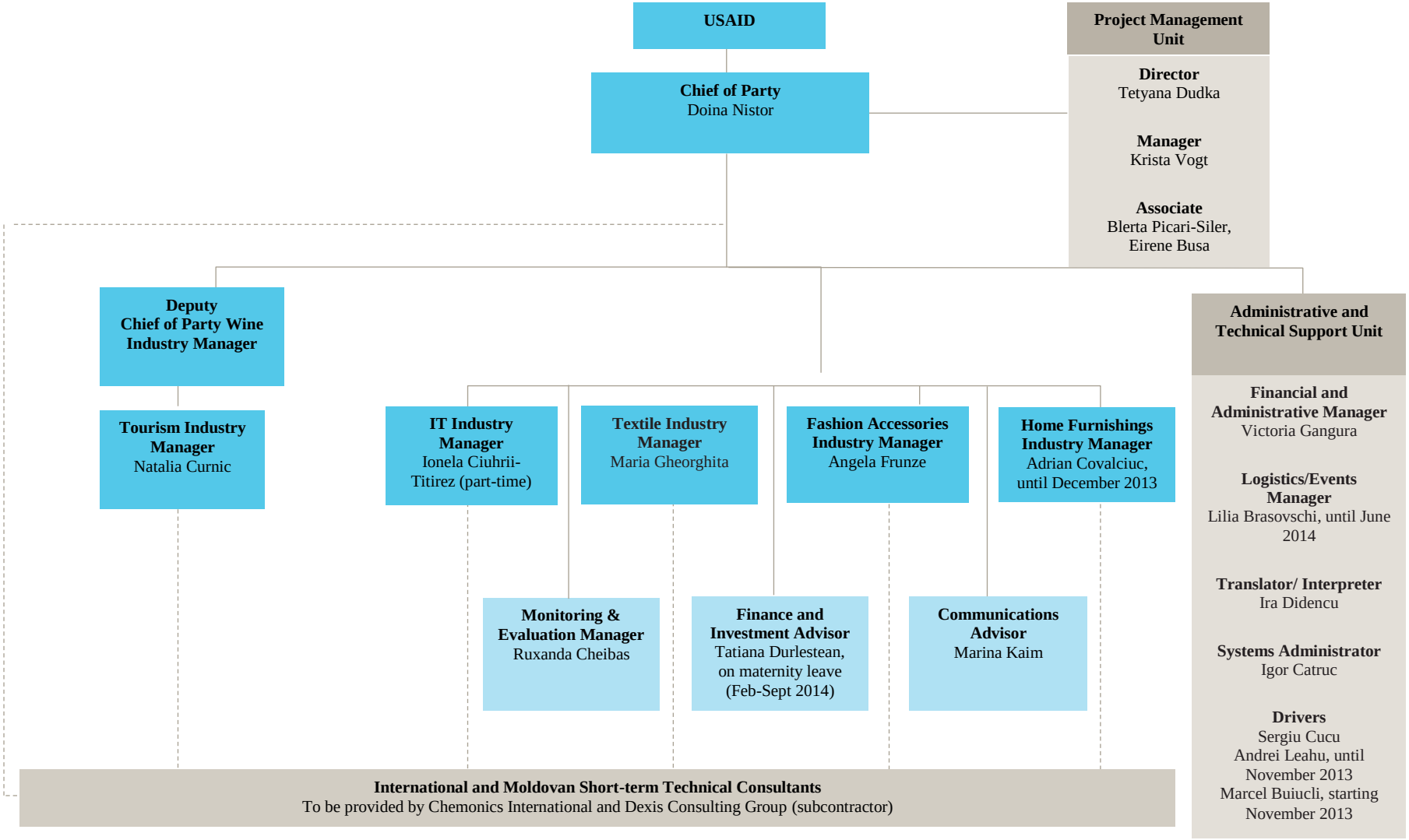
Andrei Leahu, CEED II driver, left the project in November 2013, his position being undertaken by Marcel Buiucli, in the same month. Tatiana Durlesteanu, Finance and Investment Advisor, started her maternity leave in February 2014, the management of this activity being shared between Doina Nistor, COP and Ruxanda Cheibas, M&E Manager. The position of Logistic and Events Coordinator hold by Lilia Brasovschi was terminated on June 30, 2014.

The Logistics & Events Manager position undertaken by Mrs. Lilia Brashovschi was terminated in June 2014 in accordance with the SOW and CEED II Technical Proposal.

A three-person Project Management Unit (PMU) in Chemonics' headquarters in Washington, D.C. continued to support the COP and DCOP on project management and administrative matters. In September 2014, Tetyana Dudka replaced Stephen Farkas as home office project director. There were no other changes.

# Exhibit II

## Organizational Chart



## SECTION II

# Summary of Technical Activities

Below we summarize our progress in Year 4 by targeted industry, discussing our accomplishments (including results and impact), any problems encountered, and our solutions or adjustments.

### A. Fashion Industry

### Activity 1: Consolidating product improvement through strengthening design skills within own-brand fashion companies

**Accomplishments:** The development of product design and pattern-making capabilities is a very important tool for own brand companies, to ensure the high quality of products and to stimulate sales. Therefore, during year 4, CEED II continued to support Moldovan companies from the fashion industry. CEED II provided international designers' assistance to improve local companies' collections and enhance product competitiveness. CEED II also implemented a Design and Pattern Making Coaching program for a group of companies that produce and sell under their own label, including 19 apparel, 7 footwear and 3 accessories companies. This program improved the design knowledge and capabilities of these local designers, enabling them to develop better collections and improve their vision about the design process and collection structure. In addition, CEED II helped companies improve pattern grading by training local designers. Today, the assisted fashion companies are ready to produce fashion clothing, footwear and accessories of good quality, thanks to CEED II assistance in design, stylistics, color trends, and the quality of patterns.

*Design coaching for apparel companies.* The Design Coaching program engaged two international consultants, Rymvidas Birstonas from UK, and Theresa Bastrup-Hasman from Denmark, who provided in-company assistance to improve design knowledge and skills for 10 apparel companies, 5 specialized in womens wear and 5 in kids' collections. Since design improvement is a complex and extensive process, the continuous support throughout several collection seasons is required to achieve sustainable and meaningful change. To secure the achieved improvements and bring the design processes to the next quality level, CEED II continued to support companies that received design assistance during Year 3 of the project. The consultants worked with the companies' design and management teams providing hands-on support throughout the entire design lifecycle: analyzed their sales in the past years; and improved their product policy; developed mood

Figure 1. The Mood Board for Tricon's new collection was developed with the support of the international consultant Rimvydas Birstonas.

boards and concepts for the new collections; planned new collections, with emphasis on colors and styles; and sketched sample construction and material sourcing.

Figure 2. Emilita Lux Director discussing design aspects with international consultant Theresa Bastrup Hasman

During the meetings with companies' designers, the consultants explained how a collection should be created. They emphasized that the collection should tell a story, with the theme running through each outfit, to make it easier for buyers to buy complete outfits, instead of just a few pieces. Outfits may look great in the stores, and make an impact on the retail customer, but a nicely crafted collection is not sufficient to ensure total success. A new collection should be promoted and well displayed in the shops. Therefore, the consultants worked closely with the designers on important marketing aspects, e.g. how the clothing suits their customer profile and lifestyles, and which are their competitor and/or icon brands.

Due to the positive impact of the CEED II-supported international designers on the development of local fashion companies, in March 2014, the British Embassy in Moldova supported a new project, Flying Designers, to continue assistance to Moldovan fashion companies. As a result, in April-May 2014, CEED II collaborated with the British Embassy to provide additional support to designers from the apparel enterprises.

In addition, the international consultant Theresa Hasman-Bastrup promoted the Moldovan apparel industry to Scandinavian brands. She identified the strength of manufactures in Moldova and prepared presentations highlighting the capabilities that would be of interest to Scandinavian buyers. Linking up with the Danish Fashion and Textile Association, she invited buyers on a sourcing trip to Moldova during a strategic period - the spring Fashion Walk, giving Moldovan companies the opportunity to showcase themselves in the best possible circumstances.

The provided assistance had an immediate impact and determined important positive changes in the performance of the assisted companies:

- Improved vision of the designers and companies' managers on the process of development of new collections. Designers have learned to take into consideration all major aspects of the development of a collection: fashion trends and themes identification, creation of mood boards, sketch designs, fabrics and accessories selection and sourcing, as well as a well-established marketing strategy.

- Stronger and focused collection structure, consistency in the use of qualities and details. The assisted companies learned to apply improved knowledge and processes. For example, 14 months ago, 3 companies -- Lia Fia, Creme Brulee and Maxi kids -- were mainly T-shirt brands with some girls styles with nice details, though with little link between themselves, and with a bit of a student 'look & feel'. Today they all are domestically well-known children brands appreciated for their design and quality, having the right amount of detail across styles, using appropriate qualities for trousers and tops, aligned to fashion trends and with good and consistent fit across sizes.

*Pattern design and grading.* To further deepen the skills of local companies' designers, in September 2014, CEED II organized a one-week workshop on patternmaking. The workshop was delivered by 2 professional patternmakers and international consultants, Olesea Ionita and Debora Ingrassia, from the Italian Fashion and Research Center Prima Eleganza.

Figure 3. Debora Ingrassia, CEED II international consultant, explains how to correctly build the pattern for a ladies jacket

The training was focused on best practices in patternmaking and grading, in line with the European methodologies and latest trends. Sixteen construction engineers (pattern-cutters) from 10 apparel companies who specialized in women wear production participated.. The training was interactive, with real life examples and technical information and rules for patternmaking/grading being conveyed to participants. To implement the new methods in the education system, one teacher from Technical University attended this training.

The training resulted in impressive growth in sales for the assisted companies. In the 2014 spring/summer season, when new collections and products were launched, companies recorded an increase in sales as compared to the similar season of the previous year, as follows: Tricon - by more than 2.3 times, Hincu – by more than 2 times, Cojocari Grup - by 48%, Emilita Lux - by 50%, Vistline - by more than 65%, Burlacu – by 7%, and Maicom - by 1.70%. Velitextil Plus launched its collection on the local market under the new brand Crème Brule and has had a big success. The sales of Velitextil Plus during the spring/summer season resulted in 110,000 MDL or 6% of total company sales.

*Design coaching and pattern design for footwear and accessories companies.* During the reporting year, CEED II helped enhance product design and patternmaking skills for a group of 7 footwear and 3 handbag manufacturers. Two skilled international designers worked with the companies' design teams to look at their internal processes, assess product styles, and define new product groups that would be in line with the firm's positioning and customer preferences.

The international accessories designer from the UK, Nicola Kearney, worked with 3 companies from the accessories sector—Bitprogram, Arilux and I.Tesner—to develop new product ranges and better designs. In November 2013, Nicola Kearney provided in-company consultancy and assistance to the above-mentioned companies to strengthen their design skills in manufacturing bags and leather accessories.

The main objective for Arilux and Bitprogram was to monitor the improvement of the design process and implementation of earlier developed collections. For the new assisted company, I. Tesner, the expert analyzed the entire design process in order to improve the design methods and develop a new collection for the upcoming season. Reports and recommendations were delivered to all tree bag producers and a collection of new sketches and templates of women's bags was delivered to I.Tesner.

Figure 4. Color palette recommendations provided by Nicola Kearney, designer from the UK, for bag producer I.Tesner

CEED II helped footwear companies enhance their product design by contracting the international footwear designer, Giovanni Deiana.

In January 2014, Giovanni Deiana assisted 3 own brand footwear companies -- Tiras, Hincu and Tabita-Com -- to improve their product design capabilities -- namely, upgrade and improve their overall product design processes and develop a new collection of footwear for the upcoming season. In addition, Deiana monitored 5 previously assisted companies -- Rotan, Cristina, Floare, Tighina, Oldcom -- in design improvement. During the follow-up monitoring and support, Deianareviewed the progress and improvements made in both the design process and current styles, providing feedback and additional recommendations.

In the following months, CEED II continued its cooperation with the British Embassy in Moldova to bring in foreign designers and forthe Flying Designers project. For this project, designer Nicola Kearney was contracted by the British Embassy in Moldova to assist Moldovan accessories companies. In May 19-23, 2014, Nicola Kearney provided design assistance to 5 accessories companies and designers: Bitprogram, Arilux, I.Tesner, Lorina and Irka Shoes. In each of the assisted companies, Kearney

**Text Box 1. Testimonial from fashion accessory company on provided assistance to strengthen design skills**

*"The provided assistance is invaluable, as it helped me understand many things about the design and production which until then I only sensed."*

*Victoria Boldurescu, owner and designer at Arilux*

reviewed and discussed with the company designers and management the existing collections. The review focused on the structure of the collections and the quality of items, color palette, shape, materials and accessories used and conformity to trends. Kearney answered the questions of designers and presented next season trends in accessories design.

Figure 5. CEED II design consultant Nicola Kearney discussing color trends during an accessories design workshop

Nicola Kearney organized a debriefing meeting with the management of each company and showed the existing gaps and further actions by the companies' management to improve the product design within their companies. On May 23, 2014, Kearneydelivered a workshop on accessories design, during which she made recommendations on next season trends, and gave the opportunity for 6 participants from 4 companies to ask questions about the next season trends in terms of colors, shapes and design methods. Kearney assisted the companies' designers by preparing mood boards for the 2015 spring season, and selecting colors, sketches and material combinations
Currently, companies' designers use the recommendations of the international designers in their work to develop new collections.

This assistance had the following immediate impact: Designers improved their knowledge on the development of collections and next season trends in accessories design. In addition, designers learned how to identify fashion trends, create mood boards, design sketches, select fabrics and accessories, and develop a sourcing strategy. Fashion industry companies improved their collections and now produce more competitive products.

*Concept paper for creation of the Design Acceleration Center.* CEED II helped boost the shift of apparel and footwear producers from the lowest value-added scheme (C&M) to the highest value-added scheme (own label). Experience shows that this shift is limited by the lack of innovative practical skills in design and pattern development. Since innovation and design are key drivers of sustainable growth and competitiveness for the fashion industry, CEED II created a Center for Fashion and Technology Education and Acceleration. This Center would be located within the Technical University of Moldova (UTM), and would be developed jointly with the private industry

and other counterparts. The primary goal of the Center is to integrate sustainability into education and be a resource for business development.

The international consultant Theresa Bastrup-Hasman analyzed the feasibility of and proposed the concept for a mentorship program for the future Center for Fashion and Technology Education and Acceleration, in line with private-sector needs and objectives for fashion industry development in Moldova. The concept paper for the mentorship program was developed with input from the private sector and UTM, and is based on an interactive process, in order to engender commitment by the private sector. This will be incorporated in the final concept of the Center.

**Problems Encountered & Solutions:** This activity was implemented according to the plan, no problems were encountered. On the contrary, the activity was expanded to additional new firms, given its positive impact and the additional resources received from the UK embassy.

### Activity 2: Strengthen purchasing abilities with own brand companies from fashion industry by supporting participation at raw materials/acessories exhibitions

**Accomplishments:** The ability of Moldovan companies to participate in raw materials and accessories exhibitions strengthened their knowledge and skills in purchasing the required inputs for the production of goods. It is a known fact that the quality and price of a finished product, as well as its sales price are directly influenced by the quality and price of fabrics and accessories used to produce it. For this reason, CEED II supported the participation of designers from 14 fashion enterprises in raw materials and accessories exhibitions, including as the Texworld and Premier Vision in Paris, France. CEED II also supported a trip to raw material warehouses in Turin, Italy. As a result of these visits, the designers and procurement specialists from Moldovan own brand apparel companies learned to identify and negotiate with fabrics and accessories suppliers that are suitable for their brands, andselect and purchase raw materials and accessories for new collections.

*Viit at Texworld and Premier Vision fabric and accessories fairs in Paris, France.* The success of a well-designed collection depends on having high quality and trendy fabrics. Access to such fabrics is very important for Moldovan own brand companies; it helps them have more original collections so that they may sell them in their own shops or department stores.

Figure 6. Moldovan designers get acquainted with trends in fabrics for next season at the Premier Vision Fair in Paris.

CEED II helped designers and purchasing specialists from 13 apparel companies to participate in the raw materials and accessories exhibitions - Texworld and Premier Vision Fairs. Companies with own brands Ionel, Tricon, Velitextil Plus, Emilita Lux, Sandi, Vistline, Sram, Natalia Melnic, Aller&CO, EHO, BRIO, Ponti, Codrinad were selected according to their readiness to cost-share the participation at the raw materials exhibition. The exhibitions took place in February 2014 in Paris, France.

Rimvydas Birstonas, the international designer contracted by CEED II, helped the Moldovan companies select appropriate raw materials and accessories for the fall/winter 2014 collection. The purpose of the visit was: to look at new fabrics, accessories, and color trends; to meet with suppliers; to choose fabrics for new collections; and to look for new suppliers. Getting acquainted with new collection fabrics helps planning the collection in advance and guarantees a good quality of the product. This is very important when selling collections to independent boutiques or department stores. Another purpose of trip was to find companies who work with stock fabrics and participating companies were pleased to find several such companies, many of which have agents in Romania, which borders Moldova.

*Visit at raw materials warehouses in Turin, Italy.* Most of the companies in Moldova cannot afford to buy fabrics from new collections, therefore they they have to work with stock fabrics. CEED II hired international consultant Olesea Ionita to help bring 18 designers to the three biggest fabrics warehouses in Turin, Italy: Angelo Vasino s.p.a., R&G Tessuti, di Rossi Gigliola and Ducotex. Ionita helped the Moldovan designers select high quality, natural fabrics for their collections and negotiate the price, in order to obtain a better quality-price ratio for raw materials. The designers also visited Milan to do research on fashion trendsy by Italian designers. These vists helped improve local designers' knowledge of the Italian market, and helped them generate new ideas and put them into practice.

As a result of these visits, Moldovan own brand apparel companies purchased high quality fabrics for their 2014 spring/summer and fall/winter seasons from different European suppliers and stock warehouses for a total amount exceeding €145,000. The high quality of purchased fabrics improved the quality of developed collections which were successfully sold.

**Problems Encountered & Solutions:** The activity was implemented according to the plan and no problems were encountered.

### Activity 3: Increasing sales of own brand companies from fashion industry through merchandizing and retail marketing implementation and building capacity in retail management

With CEED II support, about 70 own brand apparel, footwear and fashion accessories companies started to operate on the local market, producing and selling their own collections mostly through their own shops. These companies learned to penetrate the local market by creating a good retail store and using fashion merchandizing, which is considered the main tool to increase retail sales. Additionally, 24 own brand fashion companies opened 4 Din Inima common stores in the form of an open-space department store with one cashier machine. These companies increased sale by training their staff and successfully using merchandizing techniques, including making their stores more attractive to consumers, and creating websites.

*Development of merchandizing abilities.* During the reporting period, CEED II assisted companies that opened or planned to open new stores by providing them with much-needed organizational support that improvde retail sales and merchandising capabilities. In partnership with APIUS association, CEED II held one merchandizing training session for Din inima/Linela sales personnel and fashion manufacturers for 62 participants. International consultant Vitalii Stepanenco conducted quick audits in 3 Din inima/Linella common stores and in the 2 new stores opened by the Maicom apparel company. The consultant also visited a Bombonici apparel company store, which had been

audited earlier, and was very satisfied with the way the company implemented the merchandizing techniques they have learned. The audits were done after the training. The main objective of audits was to show the existing weaknesses that the shops face.

CEED II also contracted local consultant Svetlana Popelnitchi to help 2 accessories companies, I. Tesner and Hincu, improve merchandising in their retail stores.. In the framework of this activity, local consultant Svetlana Popelnitchi completed the following for both companies:

- Analyzed points-of-sale (POS) at their various retail stores in Chisinau, and proposed methods of customized display of company products in multiband stores (brand corners), using brandbooks and companies identity branded materials to improve company's visibility and brand recognition.
- Provided advice on store layout in order to optimize use of their retail space, proposed means for displaying the entire product range.
- Provided advice on how to set up and arrange product displays within the stores.
- Provided on-the-job training for the managers and sales persons on how to organize the shop floor and properly display products according to best merchandising practices.

Due to opening a new common stores own brand fashion companies increased sales on the local market by 14,8 mil. MDL.

*Website development support.* CEED II continued to help companies develop their websites for the domestic and international market. CEED II contracted website development companyCreativmaro Ltd.  to develop the websites for two fashion accessories companies, Tighina and Ana Popova. The newly created websites made companies more visible and attractive to clients.

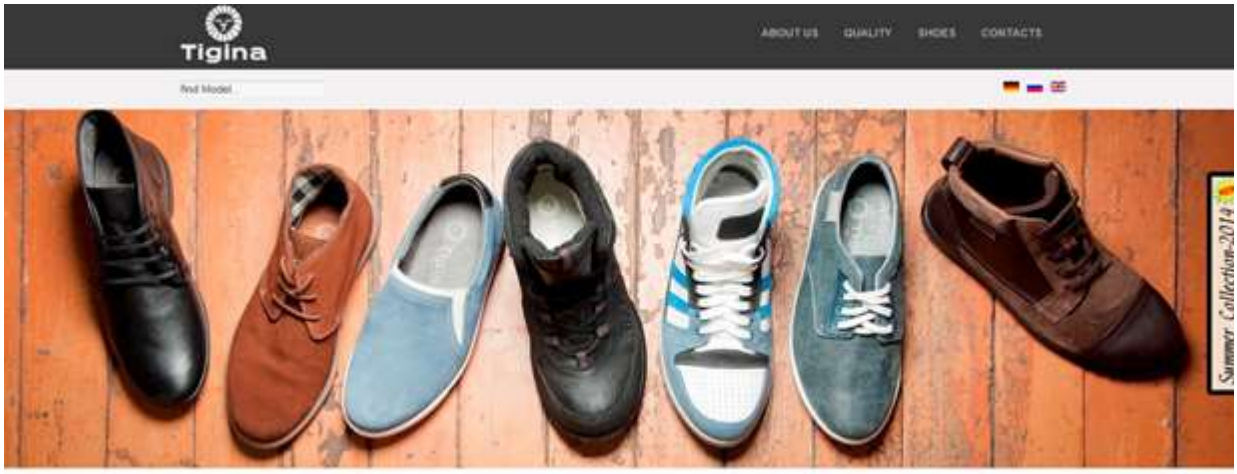



Fig.7. New website for Tighina footwear producer,

**Problems Encountered & Solutions:** CEED II had to postpone an activity that would have helped Romanita Fashion Accessories Company develop its new store’s exterior design, because Romanita was not able to find sources to finish the reconstruction of the building,

## Activity 4: Enhance planning and control methods of production orders

**Accomplishments:** Many Moldovan own brand companies have limited knowledge and skills in methods of planning and control of production orders and stocks of finished goods, because of their long history of C&M operation. CEED II provided training sessions on methods of planning and control of production orders and stocks to help them overcome this weakness. ,

*Improved knowledge and abilities in production planning and stocks control*. In November 2013, CEED II organized a two-day training session on methods of planning and control of sales, and production planning and stocks control. These trainings were conducted by international consultant Andrei Burmatikov, with the objective of increasing company sales through better planning. There were 37 in attendance, including commercial directors, sales managers or brand managers, store managers, and other personnel responsible for sales or for assortment planning. The training covered the differences between wholesale brands and retail brands, business process of assortment policy in a vertically integrated company, which combines manufacturing and retail sales, correct planning of a brand's assortment, and contained relevant case studies and examples.

The training helped companies improve their planning of the production volume, which is now better correlated with sales, and minimize stocks of finished goods in their warehouses. For example, the stocks of finished goods at the warehouse of Maicom Company were reduced by about 18% in 2014 compared to 2013.

**Problems Encountered & Solutions:** The activity was implemented according to the plan, and no problems were encountered.

## Activity 5: Build stronger and more recognized Fashion brands

**Accomplishments:** The future competitiveness of the fashion industry depends on the ability of industry players to shift from low- to high-value added, whereby companies are able toprovide cut-and-make (C&M) services to foreign customers; perform design, pattern making, and sourcing of fabric and accessories; and manufacture under their own brand. During the October 2013-September 2014, CEED II continued to assist fashion companies in building stronger own brands on the local and foreign markets. As a result, the number of Moldovan apparel companies that now produce and sell under their own brand increased from 46 to 50 companies, while footwear and accessories manufacturers –from 18 to 20. This has contributed to a bigger shift of the industry towards value-added products. At industry level, the share of companies operating under their own brand increased by around 20%. Some companies recorded outstanding growth in sales, thanks to the CEED II branding support and the Din Inima campaign.

*Developing appropriate corporate style.* During the reported period, CEED II helped 4 apparel companies -- Love Fashion, Sundi, Shram and Cojocari Grup -- as well as 2 footwear and accessories companies -- Hincu and Ju-Bijoux -- upgrade their brands and apply successful Western marketing principles. The rebranding of these companies helped them lay a new foundation for future growth.

Moldovan companies also made significant improvements in marketing, thanks to the:

- Creation and implementation of the corporate styles according to the new brand image;
- Brands corresponding to the key market segment of each company; and
- Contribution to creation of the product policy that corresponds to the brand image and target segment of the market.

By creating a brand image, companies demonstrated and consolidated their brand values, market positioning, and fundamental principles of company's identity. It made a distinct statement about the companies on the local market, helped set up relations of loyalty with existing clients and attracted new ones, increased sales and thus helped develop and grow the companies.

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Competitiveness Enhancement and Enterprise Development II (CEEDII)

# SNAPSHOT
# Marketing Made in Moldova

**USAID support to the Moldovan fashion industry helps evoke a sense of national pride and increases sales of made in Moldova products**

PHOTO: CEED II PROJECT
*Din inima stand during the visit of US Secretary of State John Kerry to Moldova.*

***"This unprecedented promotional campaign has changed drastically our consumers' perception, and made them feel proud of wearing Moldovan brands. Thanks to the Din inima campaign, Ionel's annual sales on the domestic market increased by more than 26% in 2013."***

***— Tamara Luchian, Director, Ionel apparel company***

U.S. Agency for International Development
www.usaid.gov

Historically, Moldova's fashion industry, which employs around 20,000 women, was dominated by companies that fill orders based on the patterns, fabrics and accessories sent by foreign clients—the simplest and lowest value segment of the industry. Over the past several years, as part of USAID's support to improving the competitiveness of the industry, a growing number of companies that design and produce their own products have emerged. These own brand companies create higher value products and represent the model for the future of the Moldovan fashion industry. However, on the local market, they face tough competition from well-known foreign brands and consumers who are skeptical about buying Moldovan made clothing, footwear and accessories. These challenges combined with the limited promotion skills, marketing budgets, and availability of affordable retail space threatened the success of the own brand companies.

To help these companies unite their efforts and leverage marketing resources, USAID provided financial and marketing support for a joint promotional campaign. The campaign, which was called "Din inima branduri de Moldova" or "From our heart—Moldovan brands", appealed to Moldovan consumers, and built awareness about domestic fashion brands that were competitive with imports on both quality and price, thereby improving the perception of domestic products and evoking a sense of national pride.

Twelve companies participated in the first *Din inima* campaign, which generated significant interest from local media and consumers and boosted participating companies' sales. Following this initial success, ten more companies joined the next campaigns, and it became a bi-annual activity with fall and spring editions. Each season's campaign is launched with a fashion show organized in partnership with USAID, the International Women's Club and Moldovan Fashion Producers Association (APIUS). To-date, more than 40 local brands have participated in the campaign and presented their collections at the fashion show.

The success of the *Din inima* campaigns spurred the idea to open a common retail store where local companies could promote and sell their goods under one roof. With support from USAID and private investment, the first *Din inima* store was opened with 13 fashion companies. Building on this success, USAID helped to develop a partnership with another local investor, which resulted in three more *Din inima* stores, with more than 30 participating companies, opening in Chisinau, the capital of Moldova, leveraging $2,260,000 of private investment.

*Din inima* has become a recognizable brand to Moldovan consumers with its products now being worn by Moldovan celebrities on billboards and TV shows, and many prominent Moldovans having modeled at the fashion shows. As a result, the idea of buying fashionable and quality products that are made in Moldova is resonating with Moldovans and raising their loyalty and pride in the domestically manufactured garments, shoes, and accessories.

The participating companies have learned to work together to enjoy the results of joint promotion. Companies participating in *Din inima* now contribute more than 70 percent of the promotion budget, and every dollar spent on promotion brought $65 increase in sales. Finally, the number of fashion industry association members has doubled from 37 to 78 companies.

Table 1. Trademarks developed

| | |
|---|---|
| LA TYANA | **La Tyana** (Love Fashion company) is a new knitwear brand for women, selling domestically and abroad. It was created in Spring 2010, and it is sold in Chisinau shops. It has its own retail chain, which includes 2 own brand shops and 3 common Din Inima shops. La Tyanastarted to export to the Russian market in early 2014. |
| SANDI | **Sandi** (Sundi company) is a womens wear brand that specializes in light fabrics. It mostly targets the domestic market. This brand is available for sale through a network of 2 own retail outlets, one showroom in Chisinau and 5 distributors in different regions of Moldova. |
| shram | **Shram (**Shram company) is a womens wear that specializes in thin and thick fabrics. It targets the domestic market. This brand is available for sale through a network of 5 retail outlets in Chisinau and 3 distributors in different regions of Moldova. |
| VASCONI<br>VASCONI | **Vasconi** (Cojocari Grup Company) is a brand for casual jersey wear for men, women, and children. It has been aggressively developing for a few years, targeting the domestic market. The clothing is sold through 12 own shops in Chisinau, Balti and Cahul. The project has supported the re-branding of Vasconi, which was previosly designed for sportwear. |
| HÎNCU | **Hincu** (Hincu Company) is a brand of leather footwear well known on the local market for their quality and nice style. It is a small, family-owned company based in Chisinau. Currently, Hincu employs 35 people. The factory produces a wide range of styles (classic, elegant, and casual), particularly for men and women, but has also some styles for children. The footwear is sold through 3 own stores in Chisinau. |
| Ana Popova<br>DESIGNER JEWELRY | **Ana Popova (**Ju-Bijoux) is a new brand of jewelry. CEED II co-financed the design of a corporate style, presented in a comprehensive brand book, leaflet and lookbook. This new brand will help Ju-Bijoux expand on european market, which is the target market for the company, taking into consideration its annual participation in Bijhorca international fair. |

**Problems Encountered & Solutions:** The activity was implemented according to the plan, and no problems were encountered.

### Activity 6: Assistance in promotion of local brands on the Russian market

**Accomplishments:** During the reporting year, CEED II helped local companies promote their products on the targeted markets in order to expand sales and attract new customers. Specifically, CEED II helped Moldovan companies penetrate the Russian markets, by enlisting the help of PR company, Red Designers. Red Designers promotes designers from Russia and CIS countries through PR-support and promotion of brands, development of sales channels, the formation of the professional environment and communication between all professional market players.

CEED II helped the Ana Popova jewelry brand promote itself on the Russian market by signing a contract with Red Designers for the April -November 2014 time period. In this period, the Red Designers promotion platform provided complete PR-support and promotion for the Ana Popova brand, whose products were displayed showroom of promotion company RED Designers in Moscow, on wholesale websites, as well as through their channels of communication, including fashion magazines, TV shows and others and social media sites.

Figure 8. Thanks to assistance from PR company, Red Designers, Ana Popovas jewelry is promoted on the cover of Russian fashion magazine, OK Magazine,

As a result of this assistance:

- Ana Popova jewelry received its first order from Russia, and the first batch of jewelry was successfully delivered to the customer.
- Ana Popova's jewelry has been selected by stylists of fashion magazines and TV shows for shootings.
- The Russian fashion magazine OK published the photo of a renowned TV star wearing Ana Popova' jewelry.

**Problems Encountered & Solutions:** CEED II planned to assist 5 companies that have the potential to exceed in the Russian market. But due to complicated logistics and the uncertainty of the Russian market, these 5 companies refused to participate. .

### Activity 7: Assistance in building the image of domestic fashion producers

**Accomplishments:** During this year, CEED II assisted local fashion companies promote their image by organizing the spring and autumn editions of "Din inima, branduri de Moldova" ("I love Moldovan brands") promotion campaigns. This great support started in 2012, when CEED II initiated a common marketing campaign to stimulate consumer interest in local brands and to overcome the challenge of domestic unawareness and small marketing budgets.

The campaign grew to become a recognized umbrella brand for the Moldovan fashion industry, including fashion shows, outdoor, TV, radio, magazine and internet promotion, development of look-books, loyalty card project and common stores in Chisinau, selling exclusively Moldovan brands.

In the reporting year, CEED II helped organize 2 more *Din inima branduri de Moldova* promotion campaigns (in spring and fall) in order to promote Moldovan brands of clothing, footwear and accessories. In the October - November 2013 and March-May 2014 time periods, apparel, footwear and accessories brands participated in the seasonal editions of "Din inima, branduri de Moldova" promotion campaign. CEED II co-financed and monitored the campaign, and mediated the interaction between the companies participating in the campaign and business providers employed – TV, media, marketing companies and others.

The main business providers involved in the organization of the "Din inima, branduri de Moldova" campaign were AcasaTV, Jurnal TV, Zingan.com, Casa Imago, Green Fusion Agency, Salt studio,

Casalot. Every time, they work with dedication to develop new concepts and ideas for each season, keeping the campaign interesting and attractive for consumers.

In spring 2014, the promotion campaign AcasaTV produced and released 11 reports about the fashion show and the Moldovan brands in their show *O seara perfecta*, which were afterwards displayed on the acasa.tv and perfecte.md websites. The same business provider organized 6 workshops, where the collections of local producers were showcased. Other 5 reports about Moldovan brands where run on Jurnal TV, in *Veranda* show. Another business provider, Zingan.com, promoted 9 look books on its website Allfun, produced and published on its website the promotion videos of Cristina and Crème Brulee brands. Green Fusion Agency developed look-books for 13 local producers and published the promotional materials about all producers on the Din Inima Facebook page.

Figure 9. Vasconi's collection in the Workshop organized by perfecte.md in the frame of Din inima branduri de Moldova promotion campaign

During the spring and fall editions, 65 and respectively 60 billboards promoting local brands were designed by Casa Imago Ltd, produced and displayed in Chisinau by the marketing agencies Casalot and Ponti. The costs for the promotion campaigns are shared between CEED II and the beneficiary companies (the proportion being about 35%:65% in spring, 2014), therefore, CEED II spent around 205,000 MDL, while the companies spent around 370,000 MDL.

After each edition of the "Din inima branduri de Moldova" campaign, CEED II organizes a meeting with representatives of the participating companies and business providers employed – TV, media, marketing companies and others; presentations of the main activities are made, and results are discussed. So far, the feedback has been positive; companies have mentioned the increased awareness and willingness to continue this activity.

The following immediate impact and changes were noticed as a result of the assistance:

- Every year, new local brands join the campaign. For example, in fall 2014, more than 5 new brands participated: EHO, Nanetty, Diana Voievutschi, Maxikids, Ju-Bijoux and others.

- New products were developed: Lorina Company launched in 2014 a new line of production - jewelry bags and apparel for women, while Oldcom successfully launched a new product - espadrilles on the local market.
- The local brands became more confident and expanded sales on the local market, including in the common stores Din Inima.
- Each new campaign witnessed an increase in pride and awareness of local consumers about local brands. Compared to November 2012, when the Dininima page on Facebook had about 3,000 followers, in July 2014 it had more than 8,500 followers and registered more than 9,600 in September 2014.

Fig. 10. Thedininima page on Facebook witnessed a 35% increase in followers from 2012 to 2014

Every promotion campaign is preceded by a Fashion Show, organized by the International Women's Club of Moldova (IWCM) in partnership with APIUS and CEED II. IWCM members, diplomats, local celebrities, and public figures walk the podium for one evening, dressed in locally designed and manufactured fashion brands. The spring Fashion show, organized on March 1st, 2014 was co-hosted by William H. Moser, U.S. Ambassador, while the fall one, organized on September 20, 2014 was hosted by UK Ambassador Joe Batson. Every time, the show succeeds to achieve its main objectives: raise the recognition of national fashion brands, to focus on the uniqueness of each brand and help them make their products more competitive, enhance competitiveness among different brands, encourage young designers and support design education.

The summary of key results from the Din inima branduri de Moldova promotion campaigns from 2014 are found below:

- The campaign increased the awareness of local brands amongst customers.
- The campaign increased local market sales. Compared to the previous year, Zorile commercial center increased its domestic sales by 25.5%, Bitprogram by 35%, Hincu by 96%, Ju-Bijoux by 5.5%, Oldcom by 4.8%, Ionel by 24.4%, Tricon by 39%, Bombonici by 87%, Mobile by 40%, Vasconi by 33%, Lenicris by 24%, and Zivax Maxi tripled their sales.
- The additional sales from the Din inima common stores in 2014 accounted for more than 10 million MDL in sales.
- The funds raised in the Fashion Shows ensure every season €3,000 to assist the Moldovan Design schools.

Fig.11. The Spring Fashion show 2014 hosts: US Ambassador William Moser and local celebrity Daniel Voda.

**Problems Encountered & Solutions:** The activity was completed according to the plan and no problems were encountered.

### Activity 8. Support enterprises to visit and exhibit at specialized trade shows

**Accomplishments:** The participation of Moldovan fashion companies in specialized trade-shows is an efficient instrument to find new clients and increase sales. In order to enhance the export of goods and services with higher value added, CEED II assisted the participation of local companies at tradeshows in CIS to sell own brand products in Western Europe to identify customers looking for the higher value added input when contracting manufacturing services.

Participation at tradeshow helped Moldovan companies build linkages with new customers; strengthen linkages with existing partners, get real trial orders;and establish contacts with potential customers. Systematic and permanent participation at international sourcing exhibitions by Moldovan companies under a common umbrella stand "Moldova – your reliable partner in apparel and footwear", built trust and recognition among potential customers. After participating in international exhibitions, Moldovan apparel, footwear and fashion accessories companies gained new contacts with new potential buyers. This resulted in the generation ofwhich immediate trial orders for participating companies; new contracts; and increased exports.

The main result of Moldovan fashion companies' participation at international trade-shows were the chance to attract services and orders with higher value added compared to the C&M services that they provided in the past and to increase their exports. Compared with the previous year, Ionel increased its exports by 12%, Infinitextil by 32%, Steaua Reds by 25%, Olga Ceban by 73%, Zorile by 14%, Tighina by 9.5%, Ju-Bijoux by 24%, and Artima by 5%.

*Participation of own label apparel producers at Textilegprom and CJF-Child & Junior Fashion 2014:* CEED II helped 4 apparel companies producing under their own label --Odema, Olympus, Steaua Reds and Infinitextil -- participate in the Textilegprom international fair. CEED II also helped2 children-wear producers -- Emilita Lux and Velitextil Plus -- participate in the "CJF-Child & Junior Fashion 2014" spring and autumn exhibitions in Moscow, Russia. As a result of their participation, Moldovan apparel companies established numerous contacts with a number of clients from CIS, and some of them started to sell on the CIS market successfully.

*Participation of apparel producers at sourcing exhibitions Zoom by Fatex, White label and Lingerie Pro.* CEED II helped 4 apparel companies -- Ionel, Odema, Steaua Reds and Velitextil Plus -- participate in "Zoom by Fatex" in Paris, France, the main European exhibition for sourcing. . The Moldovan companies displayed their collections with the slogan *"Moldova - your reliable partner in apparel"*. For three days, the Moldovan stand was visited by representatives of potential clients from Germany, France, United Kingdom, Belgium, Austria, Denmark, Slovak Republic, Sweden, Romania and Russia. Thanks to participation in this Parisian exhibition, Moldovan apparel companies established contacts with foreign clients, laying the groundwork for future orders.

CEED II helped 10 Moldovan apparel companies -- Ionel, Tricon, Steaua Reds, Mobile, Premiera Dona, Infinitextil, Saltoianca, Velitextil Plus, Odema and Vestra -- to participate in the "White Label" sourcing exhibition in Berlin, Germany. As a result of this participation, Moldovan companies established 42 new contacts with a variety of European potential clients. During the exhibition, a representative of SORSTE Apparel Company in Romania visited the Moldovan stand and was very impressed by the assortment and quality of garments produced by Moldovan companies. The following week, with CEED II support, the director of SORSTE Company visited 3 Moldovan companies -- Odema, Vestra and Ionel. Based on this visit, Vestra and Ionel produced samples and now those companies negotiate possible orders for the 2015 fall-winter season.

CEED II helped Olga Ceban Apparel Company participate in the Lingerie Pro exhibition in Antwerpen, Belgium for at 2 consecutive editions. As a result, this Moldovan company attracted 2 new clients; agreed on a cooperation program for the new season; and signed and executed a contract with Birdie Rock client from The Netherlands in the total amount of €9,762. With the Pretty Wild Lingerie client from The Netherlands the company signed a long-term contract based on private label scheme of collaboration and already executed and delivered items in the total amount of €18,256.

Table 2. Results achieved by the apparel companies that participated in trade-shows in 2014.

| International trade-show | Participating company | Results from participation at the expo | |
|---|---|---|---|
| | | No. of new contacts established | Impact on sales, October 2013 - September 2014 |
| Textilegprom | Odema, Olimpus, Steaua Reds, Infinitextil | 11 | ***Odema***- Sales of 150,000 Euro representing 17.1% of company's export<br>***Olympus***- Sales of 219,000US $ representing 32.73% of company's export<br>***Steaua Reds*** - Sales of 2,751,000 MDL representing 11.1% of company's export<br>***Infitextil*** - Sales of 4292,000 MDL representing 11.4% of company's export |
| Zoom by Fatex | Ionel, Odema, Steaua Reds, Velitextil Plus | 18 | ***Ionel*** – produced a trial order and it is now in the phase of negotiation of a contract for 12,000 man suits for the spring 2015 season. Signed a long term contact with Formens and Benrom form Romania and HDM France. In 2014, Ionel made orders for these clients in the amount of 1007,243 Euro.<br>***Steaua Reds*** - The company produced 6 samples of man pullovers for the French client CARVEN. Based on the quality of the samples, the company will negotiate the possible order.<br>***Odema*** - Signed a long-term contract with clients from France and Sweden; in Year 2014 it stitched clothes in the total amount of 21,812 Euro.<br>***Velitextil Plus*** - signed a contract with the client from Sweden for 1000 children dresses in the amount of €18,000 per year. |
| CJF-Child & Junior Fashion 2014 (Russia). | Emilita Lux Velitextil Plus | 15 | |
| White Label (Germany). | Infinitextil, Ionel, Tricon, Premiera Dona, Odema, Vestra, Mibille, Velitextil Plus, Steaua Reds, Vestra | 42 | The SORSTE Client from Rumania visited 3 Moldovan companies, Odema, Vestra and Ionel. Based on this visit, Vestra and Ionel produced samples and currently are in process of negotiating possible orders for the 2015 fall-winter season. |
| Lingerie Pro (Belgium) | Olga Ceban | 2 | Signed and executed a contract with Birdie Rock client from The Nederland in the total amount of 9,762 Euro. Signed a long-term contract with Pretty Wild Lingerie from The Nederland, based on private label scheme of collaboration and already executed and delivered items in the total amount of 18,256 Euro. |

*Participation of footwear and fashion accessories producers at Leather and Shoes, Mosshoes, and Bijorca exhibitions.* CEED II helped 7 footwear and accessories companies participate in the Leather and Shoes international fair in Kiev, Ukraine in January 2014. While some companies such as Floare, Tighina, Bitprogram, Arilux and Oldcom have constantly participated at this exhibition, CEED II helped 2 companies, Tesner and Tiras, participate for the first time. During the exhibition, the participating companies got acquainted with the achievements of competitors and the market trends, and established new contacts with Ukrainian and foreign buyers. The Ukrainian market is of interest

to manufacturers of Moldova, being a big market located nearby, which simplifies product delivery and reduces delivery time. Additionally, CEED II helped 3 footwear companies -- Oldcom, Tighina and Floare -- participate in Leather & Shoes international fair in Kiev, organized in July 2014. This time, the political instability determined a reduced number of participants at this edition.

In January and July 2014, CEED II co-financed the participation of a young jewelry designer, Ana Popova ( Ju-Bijoux Company) in the Bijorca international fair, in Paris, France. The repeated participation brought the desired results. After the Bijorca show in September 2014, 7 clients from France, Japan, Russia, Finland, and Belgium placed repeated or new orders for Ana Popova's jewelry.

Figure 12. Jewelry designer Ana Popova manning the Moldovan booth at the Bijhorca international fair in Paris in 2014

CEED II supported twice the participation of 2 footwear companies, Tighina and Floare, at Mosshoes international specialized footwear fair in Russia, in January and September 2014. Thanks to CEED II's support for 3 consecutive years, Floare and Tighina have established regular customers and partners on this market, and increasing their sales.

*Assistance to improve footwear producers' participation at exhibitions.* In July 2014, shoes matchmaking expert, Jordan Saliman, visited 6 Moldovan footwear producers – Cristina, Rotan, Oldcom, Hincu, Tiras, and Covalli -- in order to assess the current economic business status and potential growth opportunities, and recommend the necessary steps to grow the export capacity and develop more Unique Selling Features. He recommended the companies participate in the GDS international fair in Dusseldorf, in February 2015.

Saliman's recommendations for companies included: improving marketing measures to improve visibility; improving the quality issues (such as flexibility of soles and quality of stitching); and better preparing for international fairs.

Figure 13. Shoes matchmaking expert Jordan Saliman assessing the quality of Hincu footwear

**Problems Encountered & Solutions:** The activity was implemented according to the plan and no problems were encountered.

### Activity 9: Increasing productivity for companies 'competitiveness enhancement

**Accomplishments:** CEED II has encouraged IT adoption by apparel companies, which has led to increased efficiency as a result of productivity enhancement efforts. During this year, CEED II continued to build awareness about the Management Information Systems (MIS) and its positive impact on company's productivity, and assisted one apparel and one footwear company to develop and implement an integrated MIS. Through such pilots, the project showcases to the industry best practices and impact from MIS implementation to build enthusiasm among other firms.

*Management Information System in one pilot apparel company implemented.* CEED II supported the apparel company Maicom with the development and implementation of an integrated Management Information System (MIS), as the company expressed its interest and readiness to invest and implement the system.

After the Informational Management System (MIS) for Maicom was finalized, all processes – from purchase of raw material up to the transfer of finished product to the warehouse - were computerized. This included configuration of the main server in order to automate company's processes and development and implementation of several specific modules for tracking information related to the production function, such as "Operational records of production" (Own production) and "Accounting for the production of apparel products". Additionally, the business provider, Business Logistic company trained Maicom team on using the MIS. As a result, Maicom started the implementation of the newly developed MIS.

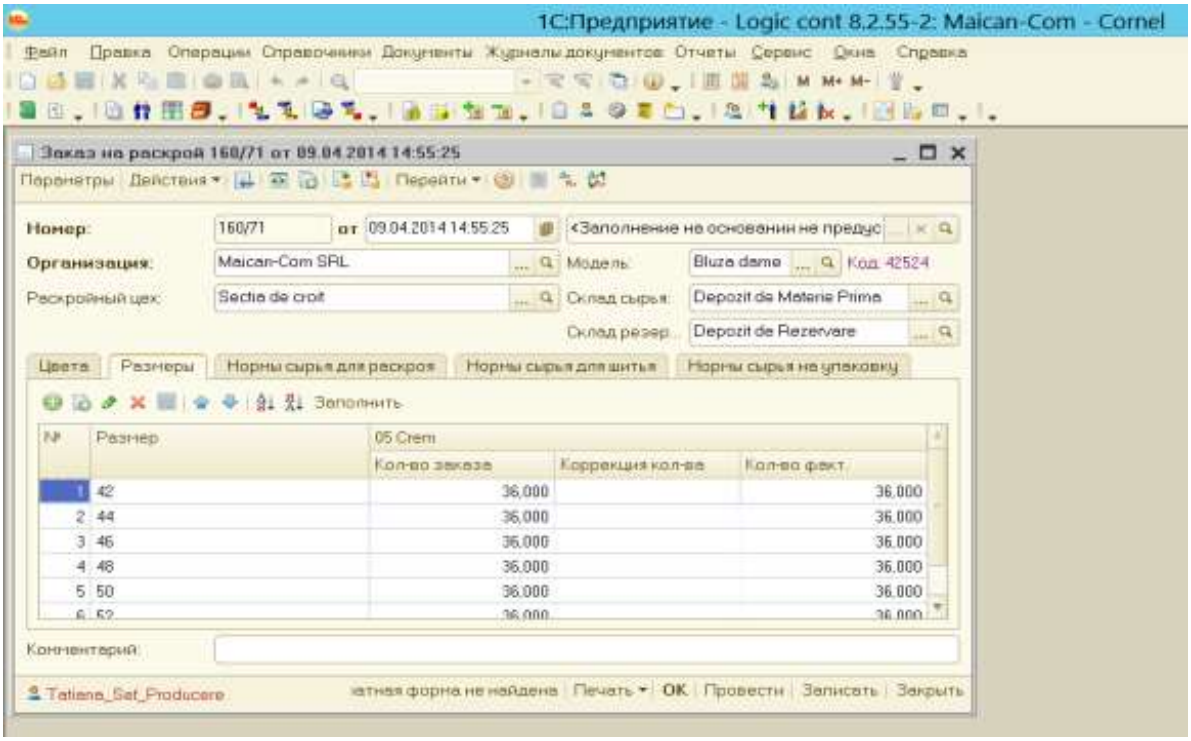

Figure 14. Management Information System (MIS) created for apparel company Maicom

*Management Information System in one footwear company implemented.* During the reporting year, the integrated Management Information System (MIS) was developed and implemented at Cristina footwear manufacturer. Supported by CEED II, Cristina implemented the 1C: Enterprise 8, Retail module, in order to fully automate its POS at Zorile commercial center and ensure uninterrupted communication with its central office. The Subcontractor, DAAC System Integrator, developed and implemented the retail software module, customized to fit company's existing business processes. Now the Subcontractor is finishing the training process in order to transfer knowledge and enable Cristina to efficiently manage the new software.

*Improvement of the leather cutting process at one accessory company.* CEED II supported accessories producer Bitprogram to improve the leather cutting process, by subcontracting a professional agency F.C.R.-Technology from Italy. The company installed and launched the new equipment and trained the company's personnel on managing the machine. Before this, the leather cutting process at Bitprogram was done manually, which affected the level of product quality and reduced productivity. In order to extend and modernize the production process, in 2014 Bitprogram invested more than 18.000 Euro in the purchase of ATOM FC 2510 machine – an automatic oscillating knife cutting system for the leather tailoring and cutting. This allowed them to streamline their cutting process and to provide services to other shoes and accessory manufacturers in Moldova. FlashCut automatic cutting system range represents the modern solution for bags, belts and shoe components. Robustness, reliability and accuracy are the main features of this line, which permits to cut leather materials within up to 3 shifts a day. The productivity of this equipment is about 100 bags/8 hours, speed of perforation being 220 holes/min and cutting speed – 50 m/min. Automation of the cutting process will contribute to increasing the manufacturing efficiency and effectiveness and further development of this young company.

The implementation of Management Information Systems (MIS) generated important positive results. Maicom apparel company reduced stocks of finished goods by around 18% due to speeding-up of information processing regarding sales by types of product and increased its productivity by around

12% due to speeding- up the information flow and exchange between business units, eliminating redundancy of information and improved the efficiency of decisions related to finance and production. Additionally, the launch of the new cutting equipment had a positive impact. As a result, Bitprogram improved the quality of leather pieces, which allows the company to be more competitive and increase the productivity by 50%. The delivery time for each order decreased by 1 week due to the new technology of cutting.

**Problems Encountered & Solutions:** Implementation of MIS at Cristina Ltd was launched in April 2013 and finalized only in September 2014, because the company director was absent for a long time, being abroad.

### Activity 10: Strenghhen APIUS capacity

**Accomplishments:** During year 4, CEED II worked with dedication to consolidate industry environment and help the industry acquire a strategic development vision. In this respect, CEED II strongly supported the industry association, APIUS, to become a stronger voice for the industry.
To strengthen APIUS capacities and consolidate its activities, CEED II involved the association in all project activities to help APIUS take over and maintain the activities initiated and supported so far by the CEED II project. Additionally, CEED II continued to successfully engage APIUS to put in place serious institutional reforms, which have strengthened its organization. Due to CEED II efforts, APIUS increased its capacity and doubled its membership, adding in 2014 more than 20 new members.

With CEED II assistance, APIUS developed and adopted the strategic and operational plans, which served as a tool to guide the implementation of association's activities during the year, their governance and organizational structure, defined members' benefits, and developed internal regulations and procedures. The structural changes were approved within the General Assembly. The association has increased its visibility and became able to organize discussions with the Ministry of Economy about the industry problems and development. Moreover, APIUS was engaged in the common promotion campaign of domestic brands, Din Inima and Fashion Walk, trainings, trade fairs, and served as a project partner.

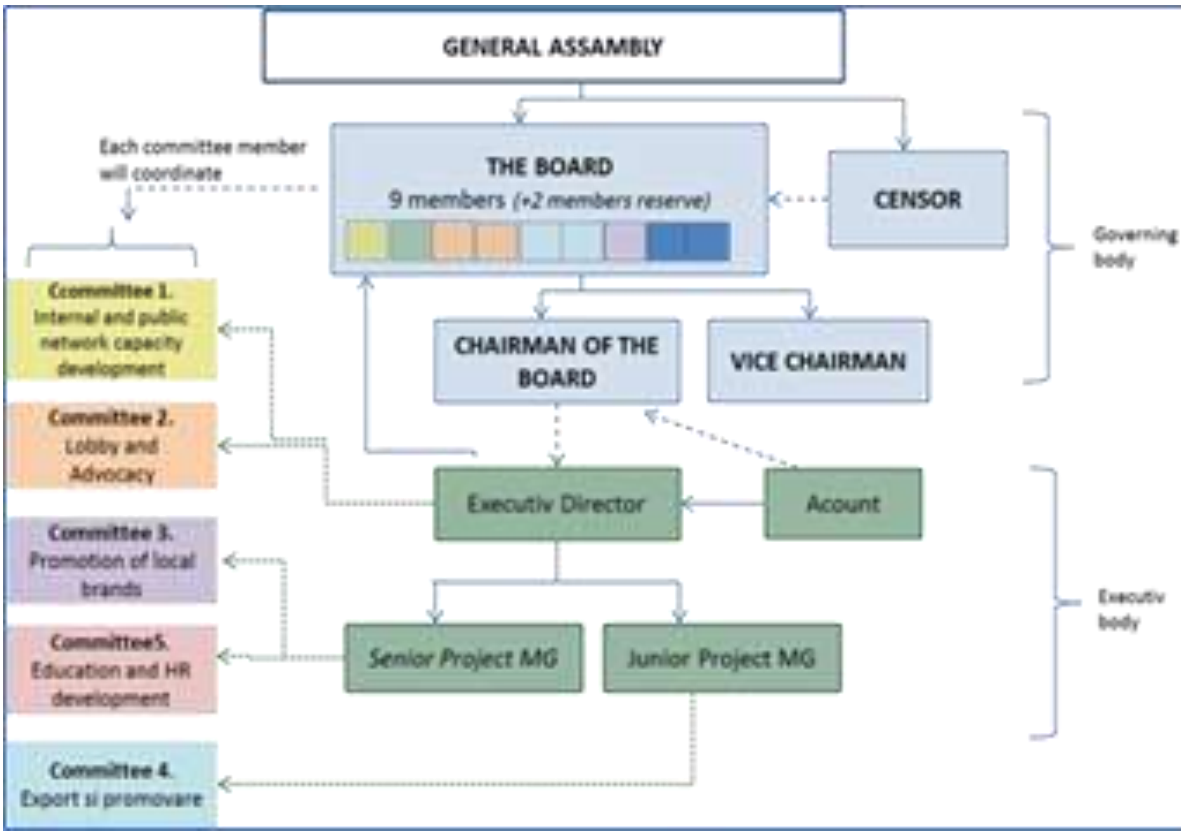

Figure 15. New organizational chart of APIUS, adopted at the General Assembly 2013

CEED II views APIUS as a successor for many of its initiatives. For instance, the Din Inima campaign and Fashion walk will be continued by APIUS, likewise the B2B website that includes a database of manufacturers.

CEED II assistance to APIUS in October 2013-September 2014 can be summarized as follows:

- Development of the APIUS Annual Report and activity plan. CEED II assisted APIUS in editing and publishing the annual report, which was presented to the APIUS members, presented at the general assembly meeting. Additionally, with CEED II assistance, the Activity plan and the budget were established. The plan was closely coordinated with and built around CEED II activities, since the budget of the organization is very small. The activity plan was built around the main priorities of APIUS, which were identified during a brainstorming together with APIUS board. In order to help the executive body implement the activity plan, 5 committees were selected.
- Improvement of APIUS structure and internal procedure. At the beginning of year 4, CEED II assisted APIUS to update its by-laws and develop a regulation setting out the principles of organization and operation of the Association Board, Chairman, and Councils. The new improved organizational structure was approved by the General Assembly of the association (See Figure 8) and implemented. A new APIUS chairman and board were elected.
- Promoting the website Source Moldova**.** APIUS, with CEED II assistance, maintained the B2B website http://sourcemoldova.com/. As such, APIUS entered data on new manufacturers, including their members and other firms, to populate the site. In order to attract new clients for Moldovan companies, APIUS in partnership with MIEPO, was involved in organizing the autumn edition of Textilegprom Trade fair.
- Upgrading APIUS website and creating an on-line library for the fashion industry. In order to establish the electronic library, CEED II contracted Next IT Company, which introduced the necessary changes to the website of the association, so the APIUS members can access the on-line library. CEED began supplementing the library with the following electronic inputs: Videos from the seminar regarding planning and control of stocks and 14 books including Sketchbook woman (3 books), Sketchbook shoes (1 book), Sketchbook bags (one book), Technical Drawing for Fashion (one book), Become a pattern drafter (Women's garments), Become a pattern drafter (Children's garments), Become a pattern drafter (Men's garments) , Become a pattern drafter (Grading women's garments), Become a pattern drafter (Grading children's garments), Become a pattern drafter (Women's garments), The grammar of Western clothing/Wearing the trousers, The grammar of Western clothing/pardessus tout. In the future, the library will be continually expanded and updated from different funds, including the Association fund.
- Development of the White Book for the Fashion Industry. In order to facilitate knowledge of the legal and regulatory framework and give to companies a direction of future development, CEED II assisted APIUS in the development of the White Book, which will include all the legal, technical and normative information necessary for the industry.
- Organization of the Fashion Show. CEED II got APIUS involved in organizing the promotional campaign *Din Inima and Fashion Show* in order to start transferring these initiatives to the association. The association was involved in organizing both editions of the Din Inima Branduri de Moldova promotion campaign, in opening the three Din Inima stores, launching the discount program Din Inima and organizing the Fall Fashion Walk. More project management and coordination responsibility was transferred to APIUS. APIUS took the lead in organizing the 2014 Fashion Week exhibition, in partnership with Moldexpo. CEED II also assisted APIUS to develop the institutional capacity for management of the Din Inima brand. The Domestic Brands Council is now responsible for the terms of use of the Din Inima logo by its members, as well as non-exclusive licensing agreements for the logo to third parties.
- Organization of trainings. APIUS, in partnership with MIEPO, organized a one-week training course on merchandising. The other training on pattern design technics was organized in partnership with CEED II Project. The association took the lead in inviting participants and managing the logistics. In many instances, the trainings were cost-shared by the members through a fee paid to APIUS. In partnership with MIEPO, the training about advantages of CAD

implementation at Moldexpo during the exhibition Fashion Week 2014 was organized. The end objective is for the association to continue the training activities for its members in the future, including on a fee basis. This will help build skills within the industry and will serve as an additional income for APIUS.

As a result of the assistance provided, the institutional capacity of APIUS increased, including the development of a strategy and regulations for the association. The organization of exhibitions and fashion shows, as well as the common promotional campaign, Din inima, consolidated APIUS and helped it become a sustainable organization representing its members on the local and external markets. As a result, APIUS has become a more attractive organization, and in the past year 21 new companies became members of APIUS.

**Problems Encountered & Solutions:** The development of the White Paper, which is designed to identify the main industry constraints, was not completed during year 4 due to the non availability of the local consultat

## C. Home Furnishings Industry

It must be noted that in December 2013 CEED II work in Home Furnishing Industry has ended, after two and a half years of dedicated assistance. The project has successfully facilitated impactful changes, most notable being the creation of Association of Furniture Producers, the first common furniture shopping center, Mobimall, that is managed through joint partnership between the investor and association, as well as improved design and branding for furniture manufacturers. CEED II placed special emphasis on sustainability in its approach. As such, Mobimall is properly established and operates on a commercial basis without CEED II assistance. The project helped the Association to further consolidate its membership, and by attributing it a critical role in the management/marketing of Mobimall, CEED II ensured motivation and value for its members. Through its design and branding assistance, CEED II changed industry thinking and demonstrated the value for better product design and marketing. Once this value has been proven, many companies are capable of purchasing these consulting services directly without CEED II.

> ”The Association is grateful for the support and for the role of CEED II in the development of our companies. We, the local furniture producers have succeeded with your help to get to know each other and to join our forces, to help each other and to collaborate like friends and colleagues. Although we feel sorry that CEED II project has ended its activity in furniture sector, we are glad that it has fulfilled its objectives while our successes will always be also your successes.”
>
> From the Association’s Thank You Letter to CEED II, December 2013

### Activity 1: Support the growth of MOBIMALL the furniture center that unites all Moldovan furniture producers

**Accomplishments:** In two and a half years of CEED II dedicated assistance to furniture sector from Moldova, the industry significantly developed, enhanced its competitiveness and became a stronger economic force contributing to economic growth and jobs creation. An important achievement of CEED II efforts is the reached awareness of furniture companies on the mutual benefits that can be realized by companies as result of strong intra-branch collaboration and implementation of joint projects. In furniture industry, the most impressive result of CEED II support was the creation of MOBIMALL, the first furniture shopping mall in Moldova. The project was instrumental in identifying this gap on the market, and had the important role to mobilize the furniture producers to implement the great idea, to assist in the investor identification, to consolidate the developed relations between the parties involved as well as to support MOBIMALL launch and promotion.

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SNAPSHOT

# Moldovan Furniture Producers under One Roof

**Moldova's first furniture mall unites domestic producers in their marketing efforts and provides customers with one place to shop for locally made furniture**

*The first common furniture shopping center in Moldova – MOBIMALL– opened its doors on August 15, 2013.*

***"Once the members of the Association have opened MOBIMALL, it became clear that Moldova's furniture industry has evolved to a new level. This is a unique project for Moldova which would not have become a reality without USAID' support."***

*– Vitalie Moraru, Executive Director, Moldovan Furniture Producers Association*

Just two years ago, individual Moldovan furniture producers, who were all operating independently, could hardly imagine that they would soon be collaborating let alone selling their products under the same roof. Today, however, those once far-fetched ideas have become their reality. The first common furniture shopping center in Moldova, MOBIMALL, opened its doors on August 15, 2013. MOBIMALL brings together more than 20 furniture companies with over 3,000 products in 15,000 square meters

USAID began supporting Moldovan furniture companies in 2011. A snapshot of the industry at the time, showed that a local consumer had to visit on average eight furniture stores before making a purchase. This report highlighted the demand for uniting the scattered, and often unprofessionally arranged, furniture shops into a convenient furniture shopping center.

When USAID started supporting the sector, the furniture makers barely knew each other let alone worked together. As a first step, USAID focused on bringing the main furniture players in the country together to discuss ways to improve the competitiveness of their industry. As a result, the furniture producers association was reestablished and now unites 17 active members in a fully functioning and vibrant organization. Next, the association members successfully co-organized the main furniture expo in Moldova, the 2012 Furniture Exhibition, which registered twice the number of visitors in double the exhibition place as the year before. Shortly thereafter, association members organized the first Moldovan Christmas Furniture Fair, which showcased special holiday offers and registered sales in excess of $35,000 during the event.

Inspired by these successful joint projects and with USAID support, the members of the Association signed an agreement with furniture manufacturer "Iurie Bors" to build a new furniture shopping center. In turn, the Association guaranteed to rent the retail space through its members. This agreement set the foundation for the first furniture mall in Moldova. Together with USAID, the Association formalized the legal agreement for tenancy and management of the center, designed a merchandising savvy floor plan, and developed a promotion and marketing plan.

MOBIMALL unites the local furniture producers in their marketing efforts, and demonstrates how despite competition, companies can reduce costs and maximize exposure through joint high-quality retail space at affordable prices thereby maximizing their sales. "It's hard to believe that just 2 years ago we, furniture producers, could barely think of doing something together, viewing each other as competitors," said Mr. Ciobanu, President of the Moldovan Furniture Producers Association. "Today our brands have a common house, at an affordable price, and are supported by a jointly coordinated and administered promotion budget."

Now Moldovan consumers will not have to visit up to eight furniture shops before making a purchase, they can find all they need under one roof. MOBIMALL has only been open for a little more than a month, so extensive sales data is not yet available, but participating companies have already recorded significantly more customer traffic than when selling separately. MOBIMALL has also already started hosting events that support young Moldovan arts and design students, which will hopefully promote the growth of the furniture sector over the long-term by preparing talented young designers for success in the industry.

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MOBIMALL was successfully launched on August 15, 2013, after almost 2 years of committed work, gathering under one roof 20 furniture brands and 3,000 furniture and home products on nearly 15,000 square meters. From its concept to the launch, private furniture manufacturer, Iurie Bors made a 2 mln Euro investment, being motivated to extend the created mall by 5,000 additional square meters of retail space in 2014.

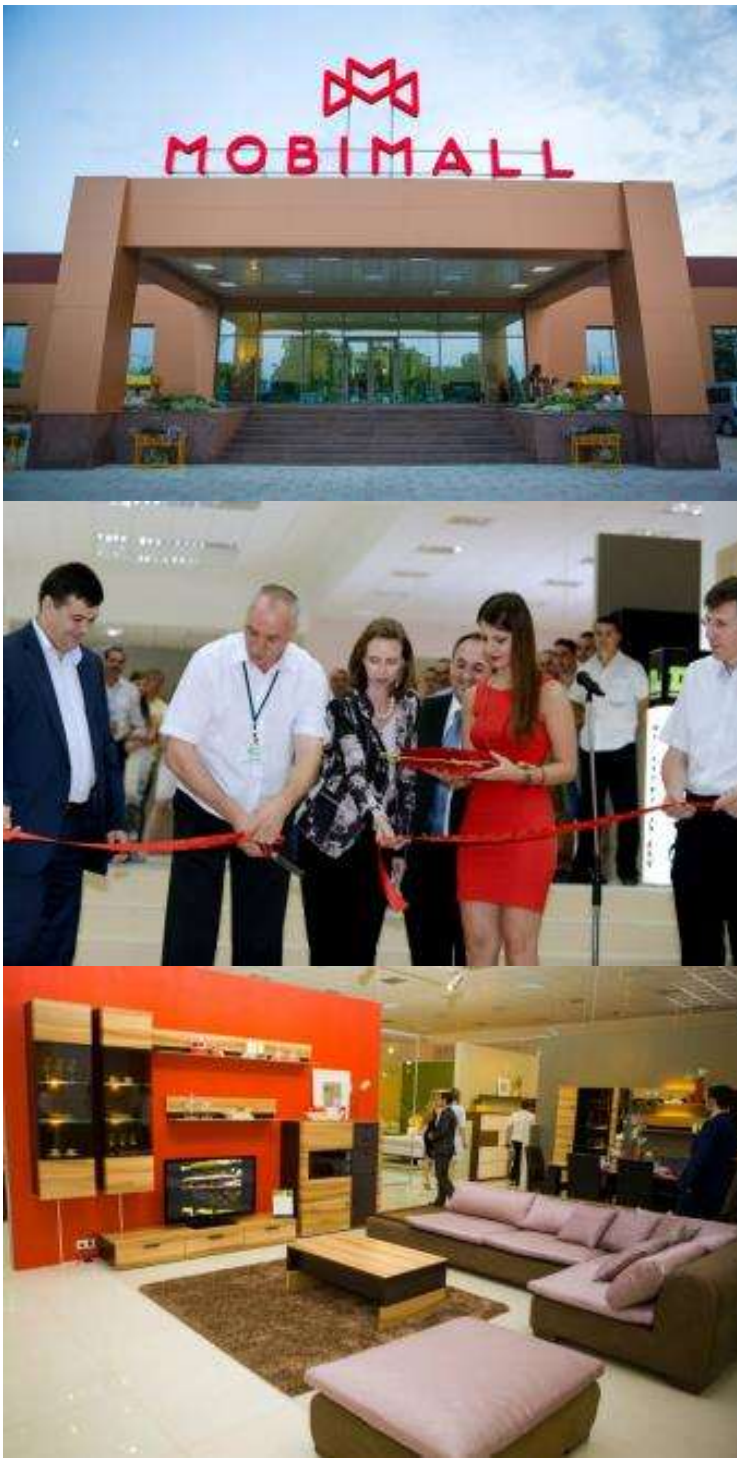


Figure 16. MOBIMALL entrance (top); Opening ceremeony of Mobimall, from left to right, Sergiu Godoroja, Vice Minister Economy, Iurie Bors, investor, Kara Mcdonald, U.S. DCM, Dorin Chirtoaca, Chisinau Mayor (center); Avantaj-AV retail space at Mobimall (bottom)

*MOBIMALL concept elaboration and implementation.* CEED II provided essential assistance during all stages of the MOBIMALL creation: from concept elaboration and legal assistance to the store design, brand development and mall promotion.

Concept elaboration and partnership set up. CEED II and the furniture association worked together to conceptualize the idea of a common furniture center, to identify the investor and to develop a site. The identified investor was a local furniture manufacturer, Iurie Bors, and CEED II took a proactive role being involved in the negotiation process between the investor, furniture producers and industry association, in order to maximize the chances for successful implementation of the project. CEED II provided significant contribution by contracting a lawyer to formalize the legal agreement for tenancy and management of the shoping center between the investor, involved furniture manufactures and the Association. To help define the concept of the mall, CEED II organized in October 2012 a visit to 2 furniture malls in Odessa, Ukraine for representatives from nine furniture companies accompanied by the Furniture Association Director and CEED II representatives. The goal of the trip was twofold: to learn new experience in furniture center organization and management and to encourage dialogue among the group members about issues of common concern.

Mall design and merchandising. CEED II provided significant technical support and oversight on furniture center construction process up to its completion. As part of technical support, during December 2012- August 2013, CEED II contracted local experts to aid on planning, design and merchandising the future mall. The merchandizing expert provided valuable advice on merchandizing aspects and layout by the elaboration of a set of merchandising rules to be followed in order to maximize customers' traffic in the stores. The designer created one design concept of the furniture shopping center to make it appealing to customers. The store was designed as a shopping mall with separate sales areas for each participating brand and distinct brand identity. One of two architects created the detailed 2D and 3D plans of the space for its best visualization and distribution in accordance with merchandizing principles and the design concept. Another architect successfully produced the master plan of the shopping center, including junctions of the commercial rooms; organization of the main technological and commercial traffic flows; general plan for the organization of the outside territory; and the zoning and adjustments of all furniture shops in the commercial center.

Brand development. CEED II engaged a design company to create the MOBIMALL corporate image, from a brand book to a presentation catalogue of furniture, as well as the shopping center website. Additionally, as part of a marketing campaign, CEED II in collaboration with the Furniture Association promoted the launch of the first furniture shopping center and, in order to ensure sustainability, developed a plan for regular promotion events.

*MOBIMALL launch.* MOBIMALL was successfully launched on August 15, 2013. Twenty furniture brands were represented by the following fifteen companies: Ambianta, Anturaj, Confort, Creator Iurie Bors, Crinela, Damashkan, Ergolemn, Libelle, Panmobili, Stejaur, Still Ferro, Tiara, Vanin-Mob, Vitraj Miracol and Molven. CEED II placed special emphasis on sustainability in its approach. As such, MOBIMALL is properly established and operates on a commercial basis without CEED II assistance.

The creation of MOBIMALL ensured sustainability for Moldovan furniture and home furnishings development for several reasons:

- It offered a solution to the lack of high quality retail space at affordable prices for Moldovan furniture manufacturers. MOBIMALL space costs less than market average, low rent price of 7-8 Euros per square meter in comparison to the market price, which is double for other locations. Also, the involvement of association in mall management allow manufacturers to maintain control over the space;

- It allows manufacturers to create a one-stop furniture shopping destination focused on Moldovan furniture, enabling local furniture producers to expand their market share, and increase the quality of domestic production;

- It unites domestic furniture producers in their marketing efforts, demonstrating that despite competition through joint sales spaces, companies can decrease costs and maximize exposure, thus maximizing sales;

- It will be used as a platform to promote exports of furniture made in Moldova and will serve as a permanent exhibition of furniture providing an ideal setting to host trade missions from foreign buyers.

As part of CEED II exit strategy is to ensure sustainability of the activities developed, after MOBIMALL opening, CEED II worked with the furniture companies to keep in mind a winner vision and to focus on strengthening the achieved results.

In the following 3 months from MOBIMALL opening, most of the furniture producers – tenants of the shopping center – reported a larger number of customers than they normally observe in their shops other place located. Therefore, the benefits from exhibiting under one roof were immediately acknowledged by the participants. This served as a motivation for the Mall owner, Iurie Bors, to further extend the furniture mall conducting construction works to create additional 5,000 square meters of retail space. More tenants will be attracted to join the mall as CEED II collaborates with the Furniture Producers Association to promote it as the main destination to shop for furniture, including home accessories. Therefore, attracting home accessories companies to the mall is the next step in the development of the shopping center.

*MOBIMALL promotion*. CEED II provided support to the Association to promote MOBIMALL by selecting the most appropriate communication channels: via TV, billboard banners, Facebook (Association's page, CEED II page, the pages of the participant companies, and MOBIMALL page). This promo campaign was named "The autumn of gifts at MOBIMALL" and lasted one month, from October 15 to November 15, 2013. It focused on attracting customers by offering a minimum 7% discount for any purchase made in the October 15 – November 15 period. Additionally, from its creation, MOBIMALL contributes by itself to its promotion as it has a common advertising budget, formed from tenants' proportional contributions, in the amount of 1euro per each square meter of rented space. It was an Association initiative and this budget is jointly administered by the MOBIMALL Promotion Council, formed by the 7 largest tenants and headed by a General Director from Stejaur Furniture Company. Following the good practice developed with CEED II assistance, the MOBIMALL continued to be promoted duirng 2014, after CEED II exited the furniture industry.

To ensure sustainability, CEED II pushed MOBIMALL to develop multiple partnerships. CEED II emphasized to the association the need to organize regular events in the mall, such as fashion presentations, photography and art exhibitions, interior designer competitions, or events like the winter charity bazar or the night of art. As result MOBIMALL partnered with Novateca Moldova Project and jointly organized on December 6, 2013 an event aimed to promote Moldova's network of libraries.

**Problems Encountered & Solutions:** Initially, CEED II's idea of a common furniture center for Moldovan furniture producers was met with doubt and pessimism, due to the low level of trust amongst companies and the lack of industry collaboration. But as the project was implemented, it gained recognition for its achievements. The fact that today MOBIMALL is fully functional and gaining momentum, being a strong motivator for the Association, demonstrates the success of CEED II's efforts. During CEED II assistance in the furniture sector, the project motivated the Furniture Association first to further consolidate, and second, to consider various options of implementation of the furniture shopping center idea. The industry finally became responsive; companies learned to trust each other and changed their mindsets as they felt they can change things to better.

### Activity 2: Support the furniture manufacturers association

**Accomplishments:** In two and a half years of in-depth project assistance to Home Furnishing Industry, CEED II succeeded to strengthen industry position and successfully facilitated impactful changes, among most notable being the creation of Association of Furniture Producers and opening of MOBIMAL, the most important common activity implemented by association and managed through joint partnership between the investor and association. CEED II helped to strengthen the young furniture association to become operational, to demonstrate its value and to build its institutional capacity. By the end of CEED II assistance, the association became a fully functioning and vibrant body consisting of 17 dues-paying members, having in place an Administration Council, an Executive Director, an office and an activity plan

CEED II placed special emphasis on sustainability in its approach. The project helped the Association to further consolidate its membership, and by attributing it a critical role in the management/marketing of Mobimall, CEED II ensured motivation and value for its members.

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SNAPSHOT

# Together at the Table: Furniture Producers Join Forces

**Moldovan furniture producers are strengthening their industry and establishing new partnerships with assistance from USAID**

*The agreement on the united furniture center creation is signed*

***"Really, before August 2011 it could not be said there was a furniture industry, only individual companies all operating independently. The fact that we are now starting to talk about the sector this way is a success."***

*– Vitalie Moraru, Executive Director*

In a small country like Moldova, one would expect strong relationships between key players within a given industry. However, until recently, Moldovan furniture makers barely knew each other let alone collaborated. This lack of coordination left the industry struggling to overcome a number of unfavorable market conditions. However, despite these challenges, USAID recognized the industry's potential and began working with sector stakeholders in mid-2011.

To launch its support to the industry, USAID invited more than 30 furniture companies and other key players in the sector to discuss how to strengthen the industry. These discussions spurred renewed interest in reviving the dormant industry association as a way to increase collaboration. At the same time, to better understand the regional competition, USAID sponsored furniture company representatives' visit to a trade show in Moscow. After the trip, at a USAID organized round table, furniture company representatives signed a Memorandum of Intent to restart the association. After a few months of planning and negotiations, the Association of Furniture Producers of Moldova was reestablished.

The Association already has 17 active, dues-paying members, and the cooperation is already having an impact. First, the opportunity for furniture makers to form partnerships is a big success in and of its self considering that many of the furniture producers did not even know one another less than a year ago. Now Tiara company sells furniture in Ambianta stores and Polimobil offers their upholstered furniture in the new Stejaur store. With USAID's support, members have benefitted from attending trade shows in Moscow and Cologne, market research, and trainings on topics such as merchandising and sales techniques. Anturaj and Stejaur companies have already jointly produced a large order for which they shared machinery and jointly purchased raw materials to save money which freed up funds for marketing and promotion.

In addition, Association members have joined forces on three major projects. First, they co-organized the main domestic furniture expo in Moldova, the 2012 Furniture Exhibition, promoting furniture made in Moldova. Following the success of the September fair (which registered twice the number of visitors and twice the exhibition space) the Association organized a Christmas Furniture Fair to present special holidays offers to their customers. Finally, after much planning and intensive discussions, members agreed to develop a common furniture shopping center that will serve as a single venue for Moldovan consumers to shop for locally made furniture. MOBIMALL opened its doors on August 15, 2013. The Association also hopes to use the center to showcase their products to foreign buyers in the future.

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***A viable Furniture Association.*** With CEED II support, UPM became the leading sector association in Moldova whose members are the companies that produce more than 70% of domestic furniture. UPM is distinctive to its members through the successful implementation of its important goal- MOBIMALL creation and its efficient management in partnership with the investor.

When CEED II started to assist the home furnishings industry, the most visible sector constraint was the lack of collaboration and low trust level between the companies. Thus, existing at that moment 2 furniture associations, Mobila Grup with 17 members and the Association of Furniture Producers of Moldova with 21 members, were functioning only on paper. As such, CEED II took a careful approach, not taking sides or picking winners. Rather, CEED II supported ways to bring the stakeholders together and build trust, through organized trainings, visits to exhibitions and later, peer-to-peer discussions with Romania furniture manufacturers, and group discussions on various topics of interest. By following this approach, a constructive dialogue was initiated and the companies agreed that a viable association was needed; so they decided to revive the Association of Furniture Producers of Moldova.

In order to intensify the dialog among the group members about issues of common concern, as well as to learn from good practices, in November 2011, CEED II sponsored a visit to the MEBEL furniture exhibition in Moscow, Russia. The representatives from five furniture companies were accompanied by Jeff Baron, an international furniture consultant. In January 2012, CEED II supported six furniture companies to participate at the exhibition IMM Cologne, Germany. The trips motivated the participants to create a functional furniture association in Moldova.

During the round table organized in November 2011 by CEED II on the state of the furniture industry in Moldova, 25 furniture company representatives signed a Memorandum of Intent to restart an association. Later a working group with representatives from eight companies was formed and had regular meetings in the following months discussing the statutes of the association and its goal, the job description of the future executive director and other essential matters. During December 2011 - March 2012, the working group met frequently to discuss the association issues and interviewed several candidates for the executive director position. An individual has hired in March but resigned in April due to another offer, and a new executive director was hired in May 2012.

In this period the working group, supported by CEED II, determined the main objective of the association - the creation of a common furniture shopping center. This goal was a strong motivation and a powerful force for keeping the group together. Working on this direction, the association administrative council (board of directors) visited several possible locations for the center and in May 2012 they began to negotiate the terms of a long-term agreement with furniture producer, Iurie Bors.

CEED II supported the association by hiring a local lawyer to provide legal advice concerning the terms of MOBIMALL partnership. The provided assistance turned to be even more valuable since the layer noticed that the existing association was created by individuals from furniture sector and not by companies. Thus, in August 2012 the association changed its legal and its name, becaming the Union of Furniture Producers (UFP).

In September 2012, the association signed a contract with Mr. Bors to open in August 2013 a 14,000 square meters common furniture shopping center. The center was opened according to the established deadlines and it became a one stop destination for shopping furniture in Moldova. The followed objective was to increase retail traffic for all the companies and permit them to use their marketing resources more effectively.

Also, in September 2012, with CEED II support, the association successfully organized participation by 12 companies from the association at the annual Moldovan furniture expo at Moldexpo, September 19-23. The association rented one of two pavilions at Moldexpo, organized attractive furniture displays, and planned and executed an effective media and PR campaign that brought in a lot of visitors, two times that of 2011. This strong showing at Moldexpo helped the companies to make sales of approximately $91,500 during the expo.

***Strenghening furniture association.*** CEED II continued its assistance to the association helping to make it operational, able to demonstrate its value and to build its institutional capacity. By the end of CEED II assistance to furniture sector, the association became a fully functioning and vibrant body consisting of 17 dues-paying members, having in place an Administration Council, an office and an activity plan. There are nine very active members in the Association, who form the Administration Council of the Association. Its associative goals are built around Mobimall, since the Association is co-managing the project that is of high importance for the furniture industry in Moldova. The opening of the MOBIMALL consolidated collaboration among the association and its members and helped the association to overpass the difficult moments that occur in the maturity process of an organization.

In October 2013, the Executive Director of the furniture association left. The board has since struggled to find a replacement. The fact that the association does not have an executive body posed difficulties on its continuous operation. Nevertheless, the members of the board became active and splited the responsibilities for managing the association, especially concerning MOBIMALL. The President of the Association became involved more in the day to day work and an Interim Director was appointed. Additionally, the opening and running of Mobimall meant more responsibility and involvement from the members of the association and it also meant the necessity to better organize themselves. During first 2 years fromits creation, the association was confronted several times with the inability of companies to pay their contribution to the Mobimall marketing budget, causing postponement of promotion campaigns for the Mall and the inability to pay the salary of the Executive Director on time. Nonetheless, CEED II saw this as a natural maturing process as the opening of the Mall meant an increase of the efforts and responsibility for the association.

CEED II facilitated increase of Association's public awareness and visibility in order to attract new members. Thus, CEED II helped create the Association website by selecting and contracting a professional web developer. Additionally, CEED II collaborated with the Association to promote Moldovan producers' furniture on the local market. The Made in Moldova promo campaign lasted from May 2013 through December 2013 being promoted directly in companies' stores (brochures distribution) and trough websites and Facebook pages of furniture companies', CEED II and the Association. As result, the association managed to make MOBIMALL known on the local market and attracting an important number of customers.

**Problems Encountered & Solutions:** The level of trust amongst companies in the industry was low. In addition, as noted above, the association was initially incorrectly registered, causing some delays while the association was reregistered properly. The new association was registered by nine companies, its founding members, but with the intent to add new members. Subsequently, when other would-be members were asked to pay their dues, only a few did so, and by the end of fist year of the association activity, the association had only 14 members in good standing even though more than 20 had originally agreed to join the association. However, CEED II made all efforts to motivate the association members to collaborate and work together through the ambitious project of Mobimall. Working to implement this idea, members have seen that working together brought real gains and advantages. Impressed, several new furniture companies have joined the association.

CEED II helped the association become operational, creating the conditions so that this independent body expands its influence in the sector. MOBIMALL furniture center is the main activity of the association, and holds the association in place. In the future, Association members need to develop new sector activities among which open dialogue with the Government, combating illegal production

and imports, collective buying of raw materials and services, new common projects, trainings and workshops for association members to teach consumers the criteria for quality furniture, etc.

### Activity 3: Organize trainings for furniture retailers

**Accomplishments:** During its assistance to the furniture sector, CEED II organized trainings for local furniture producers as well as helped them participate ininternational exhibitions. The exhibitions motivated the local companies to consolidate their efforts to create MOBIMALL for increasing local market share, and the provided training helped the companies increase their competitiveness.

***Support participation at international trade exhibitions and B2B events.*** In the first year of CEED II assistance to the furniture sector, in order to consolidate the sector and to increase companies' exports, CEED II supported 5 Moldovan companies to participate in the MEBEL furniture exhibition in Moscow inNovember 2011. In addition to visiting the MEBEL expo, the participants visited the Grand Furniture shopping center and an IKEA store to accumulate further information about the Russian market. In January 2012, CEED II sponsored representatives from 6 Moldovan furniture manufacturers to visit IMM an international trade show in Cologne, Germany. The group also visited a furniture center in Bonn and the Cologne IKEA store to observe and to learn best practices.

These trips were very important for local producers, to help them understand what the requirements of foreign markets are, and to help them appreciate their products' competitiveness when it comes to quality and price. These trips demonstrated the existing high level competition in international furniture markets and had a positive consequence of determining Moldovan producers to unite their efforts first, to regain the Moldovan market and later to expend the sales on other markets. As result, the establishment of a common shopping center as well as the furniture expo served as effective marketing platforms for visiting international buyers and partners. For example, inward trade missions by foreigners could be arranged around the center and Moldexpo.

Consequently, in June–August 2012, the association successfully negotiated with the furniture expo organizer, Moldexpo, to rent one of two pavilions to the association and to allow them toidentify furniture companies wishing to exhibit, design the floor plan layout, organize consumer loyalty incentives, and plan and execute a media and PR campaign. Then with CEED II support, the association successfully organized 12 companies' participation at the expo, September 19-23, 2012.

***Training organization.*** CEED II organized trainings on sales and merchandizing for managers and employees of furniture companies that have retail operations in Moldova. These trainings helped to develop the sales and store management skills that are missing in the industry but are critical for sales growth. These courses were beneficial as they also helped consolidating the association and raising awareness of furniture companies' directors on the importance of investing in their workforce development.

In February 2012, Mr. Baron delivered management training for top managers and retail store managers from Moldovan furniture companies. The training was intended for furniture producers that own and operate their own retail stores, since a major constraint to the development of the industry is the fact that most manufacturers have weak management systems, both in production and retailing. Most producer-retailers do not understand or use key performance indicators (KPIs) or other benchmarking techniques and do not collect data or keep records about the performance of their factories or stores. Therefore they are ill-equipped to make management decisions. This training provided to 40 representatives of Moldovan furniture companies with tools to help them manage their business. It presented best practices in furniture manufacturing and retail store management, focusing on the use of KPIs.

In April 2012, CEED II organized a series of sales trainings that targeted shop personnel. The

trainings were developed after extensive discussions between the administrative council of the association and the training provider, AXA Management Consulting. There were four sessions of the training, each session lasted two days and had 20 participants; thus a total number of 80 sales people were trained. The training was structured around the usual pattern of communication between a sales consultant and a customer, focusing on each stage of the consumer's purchasing decision. For each stage, sales personnel were given specific techniques. All participants were involved in practical exercises, developed and organized to build appropriate skills and habits. The goals for the training were for participants to be able to: use a coherent and structured approach in sales; establish a positive relationship with a potential client; identify clients' needs and expectations; communicate effectively in order to satisfy these expectations and needs; offer a convincing presentation of the products and services; effectively overcome client's objections and doubts; use adequate sale closing techniques to obtain customer involvement; and offer a customer oriented service and display a positive attitude in sales.

In May 2012, CEED II organized merchandizing training with a Ukrainian merchandizing expert. It was attended by 32 participants. The course targeted company owners, general managers and retail store managers. Specific merchandizing techniques were offered and the rationale behind them was explained. The goals for the training were that after the training the participants would be able to: use laws and rules of visual presentation of goods; present goods for customers in the most advantageous way; assess the unemployed resources and put them to efficient use; and increase store profitability by using simple and relatively cheap measures. In addition to the training, five companies (Ambianta, Confort, Ergolemn, Anturaj, Polimobil) were selected for company-level assistance, which began with merchandizing audits of the companies' stores. The consultant spent 2-3 hours in each of the selected stores in order to study the current situation and then developed a detailed report with a set of recommendations for improvement.

In October and November 2012, CEED II organized a series of sales trainings in sales management, using the Theory of Constraints principles. The trainings were developed after discussions between the administrative council of the association and the training provider, TOC Consulting. There were two one-day training sessions, each with about 20 participants. Thus a total number of 40 sales people were trained. The TOC expert trained the participants on how to use a coherent and structured approach in sales; establish a positive relationship with a potential client; identify clients' needs and expectations; communicate effectively in order to satisfy these expectations and needs; offer a convincing presentation of the products and services; effectively overcome client's objections and doubts; use adequate sale closing techniques; and offer a customer oriented service. The training included case studies and examples relevant for furniture stores. Feedback from participants, gathered within follow-up assessment, was highly positive.

During February – March 2013, with CEED II support, association members received 3 sales trainings for their staff. The trainings were organized as two-day courses with 20 participants each. As a result, a total number of 60 sales staff from furniture producers was trained. The training was highly appreciated by the participant companies because trainers focused on developing and reinforcing practical sales skills. The opening of MOBIMALL in August was an opportunity to apply these newly acquired skills and helped companies increase their sales in comparison to the sales revenues from other locations.

**Problems Encountered & Solutions**: In general there were no major problems encountered when implementing this activity. All companies were quite engaged and appreciative of the trainings, even asking for more of the same in the coming year. CEED II has succeeded in consolidating the Furniture Association and proving to its members that they can all benefit from jointly organized training courses and workshops. The sector has never united its efforts before inorganizing such activities. CEED II involved the furniture association to organize trainings in order to share the experience and helpr it organize in the future trainings on a regular basis since this contributes to strengthening the Association.

## Activity 4: Improve enterprise marketing skills

**Accomplishments:** Many Moldovan furniture companies are not following the world-wide trends and technologies in design, and have weak in-house design skills. Similarly, many firms do not brand, market, and promote their businesses, due to limited capacity in these areas. Such weaknesses are inhibiting sales growth. To demonstrate a new way of thinking and doing business, CEED II assisted several companies directly, helping them improve their skills of product development and design, branding, marketing, and promotion.

*Support in design*. CEED II supported 5 design projects to help furniture producers, Stejaur, Polimobil, Tiara, Vanin and Panmobili, to develop new collections.

- *Stejaur* received CEED II support in May-August 2013. This company was well known in the past, but has traditional and old designs. The new management was willing to remake the good image of the company in terms of good quality and nice design, thus CEED II contracted in May 2013 the same design consultant, Inga Poskiene, to work with Stejaur to create 3 new collections of upholstered furniture. The consultant incorporated latest furniture trends showcased during the April Milano furniture fair into the new collections of Stejaur. As result, in August 2013, 3 new collections were produced and launched on the market. These used the new upholstery manufacturing line, recently purchased by the company. The collaboration with the design consultant was highly appreciated by the beneficiary firm, especially because they were making their first steps in upholstery production and needed guidance to develop new collections in order to get a distinct positioning of the company on the market. The implementation of this design project motivated Stejaur to rethink the process of creation of new furniture and to proceed to restyling of old products.

- *Polimobil* received CEED II support in October 2012-August 2013. This company, focused on upholstered products, was strongly willing to improve its products having at the same time a good potential. CEED II contracted Inga Poskiene, an international furniture designer, to help Polimobil develop a new range of furniture, applying modern design principles.

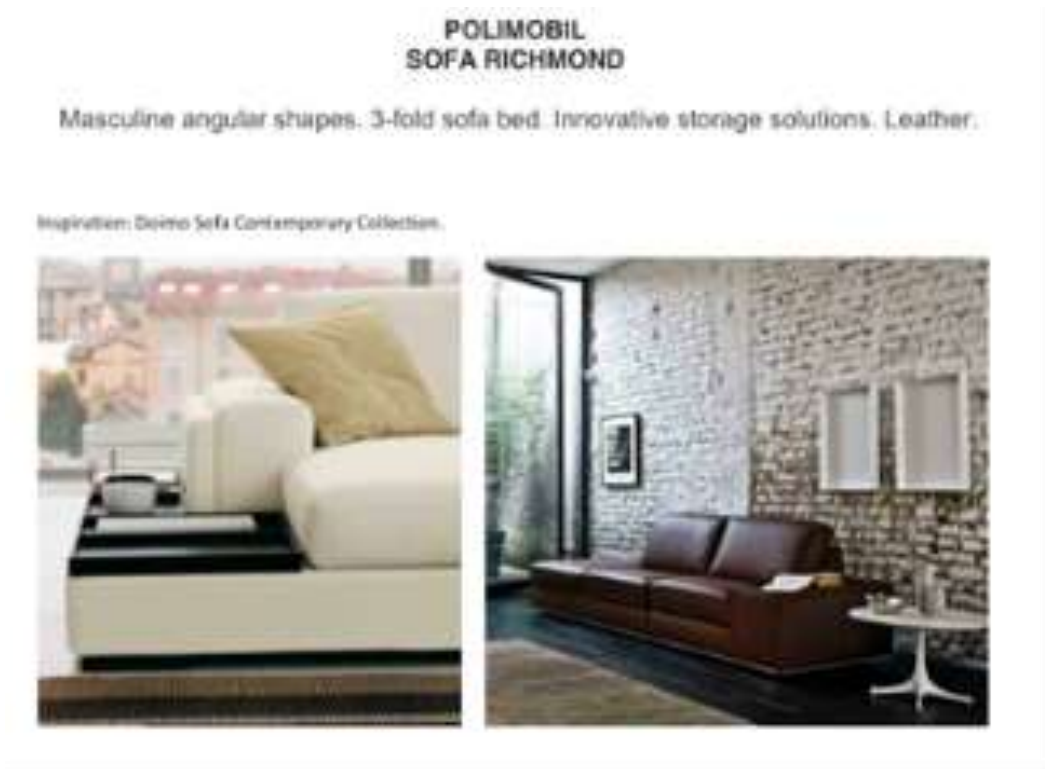



Figure 17. The new sofa style proposed by CEED II international designer, Inga Poskiene, to Polimobil beneficiary firm

By the end of February 2013 this project was completed successfully: 4 new collections of sofas were developed and another 7 existing products received a restyling. The new prototypes were manufactured by the end of August 2013 and put in stores. This collaboration was really fruitful as it immediately resulted in increased sales in Polimobil stores. According to the company management, their customers really appreciated both the restyling and the new products. In addition, the opportunity to work with the design consultant allowed Polimobil to make some bold design decisions, to experiment and to add product details and finishes they were not confident about in the past.

- *Vanin* received CEED II support in October-December 2013. As result, 3 new collections of products were created and 8 existing items were restyled.

Figure 18. New developed product for Vanin furniture company by CEED II consultant Inga Poskiene

Vanin's new collection of furniture products was launched in April 2014 .This collection consisted of 3 new products – 1. Contemporary sofa, 2. Neoclassic sofa, 3. Horeca sofa. The new products also come with new color and pattern recommendations that as opposed to the old ones are more reserved / minimalist / easier to use in any setting and are positioned to satisfy the economy / middle segment of the market.

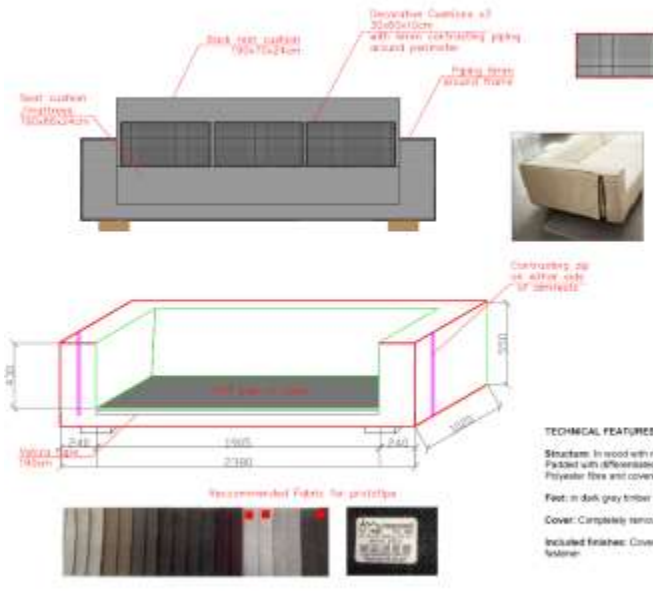



Figure 19. New developed product for Panmobili furniture company, Contemporary Sofa Zip by CEED II consultant Inga Poskiene

- *Panmobili* received CEED II support in October-December 2013. During this period, 3 new collections of products and a new concept creation for their new store in MOBIMALL was

finalized. Panmobili plans to launch its new collection of products in May 2014. This collection consists of 2 new products – 1. Contemporary sofa "Zip" and 2. Contemporary sofa "Manhattan". The new products also come with new color and pattern recommendations which are more reserved / minimalist / easier to use in any setting, compared to the old ones and are positioned to satisfy the middle segment of the market. Additionally, the design consultant has successfully helped Panmobili to create the design for their new store in Mobimall namely: the general layout, display planning, USP design, signage design, styling and color coordination inside the store.

- *Tiara* received CEED II support during October-December 2013. As result, 3 new collections of products were created and 8 existing items were restyled. Tiara launched the new collection of products in January 2014. This collection consisted of 3 new products – 1. Sofa bed box, 2. Sofa bed cape, 3.Sofa chaise shell. The products were designed bearing in mind the necessities of local customers as well as the fact that the company plans to start exports to Europe and Romania as a first destination market. The new products also come with new color and pattern recommendations, which are more reserved /minimalist / easier to use in any setting as compared to old models, and are designed to satisfy the younger segment of the market or for office use (with a very attractive price).

*Assistance in building successful brands.* CEED II assisted local furniture producers to re-brand and/or re-position themselves on the local market. During CEED II activity in furniture sector, the project assisted 9 furniture producers, to (re)brand and/or (re)position themselves on the local market, to improve their product development and design skills, marketing, and promotion. The rebranding projects for all furniture companies were successfully completed by the end of CEED II assistance to the sector.

**Text Box 1. Testemonial from furniture producers on rebranding assistance**

*"The rebranding had an immediate positive impact on final consumers. They were attracted by the new company image, by the quality and style of new product catalogue. The newly developed website is unique representation for the furniture industry."*

*Corneliu Panus, co-owner of Panmobili*

*"Being the first furniture company on local market that started the activity in 1912, Stejaur needed this brand refreshment that corresponds to modern trends and reflects company history and traditions."*

*Eduard Bunu, owner of Stejaur*

Figure 20. New logo for Panmobili and Stejaur

In October 2012-September 2013, CEED II initiated brand improvement for 5 furniture producers, Panmobili, Trabeco, Stejaur, Prima, and Crinella. The design work for Trabeco and Prima was finalized by the end of March 2013, while for Miscare, Stejaur and Panmobili - by July 2013. Crinela was added later on, in June 2013, to support a restyle of its brand. Additionally, during June, another activity was initiated to develop a new brand identity for Crinela. The rebranding was successfully completed by the end of September 2013.

In the last quarter of CEED II assistance to furniture sector, October –December 2013, CEED II supported other 4 rebranding projects. Ambianta restyled its existing logo and has used its new company brand book since November 2013. It has updated its website and facebook page and is already using new pos materials and the brand new product catalogue. Because restyled its existing logo and started using its new company brand book in

December 2013. It has updated its website and facebook page and is already using new pos materials and the developed brand product catalogue. Baljic Grup created its new logo and started using its new brand book from in December 2013. The company is also using the new pos materials and the brand new product catalogue. D.Solodcenko created its new logo and will start using its new company brand book in February, once it has completed registration procedures for the new brand.

All companies that participated in rebranding projects have reported that immediately after they implemented the change they noticed an improved perception of their company by customers and that their improved image helps them achieve better sale results as they start to promote and position themselves more professionally.This motivated the companies to implement the new identity and to invest more in this activity. As result, one company, Stejaur invested €4,000 in the following activities: a video clip production that presents the company and its products, a TV spot running on differen chanells, light boxing installation outside the store to highlight the company name, banners printing for 3 stores, new corporate documents printing. Another company, Panmobili, invested €1,000 in 5 banners printing and 2 banners supports production, in metallic labels with new logo that are applied on furniture, booklets, and business cards.

**Problems Encountered & Solutions:** Given the high ambition of this task – making the sector rethink the way it does business today - two years are not enough for a systemic change. Many companies are just beginning to ask themselves whether the design of their products really reflects the market demand. CEED II supported these companies in order to build a critical mass of companies that have improved approach to the design and branding processes. This will maximize the impact of such activities on the entire sector.

### Activity 5: Promote Moldovan made furniture in the domestic market

**Accomplishments:** With the creation of MOBIMALL, furniture produucers better understood the big impact of promotions activities on increase of the sales. Supported by CEED II, they started to create a relationship with potential clients through widening the information on product they offer, focusing on communicating products advantage in terms of quality, price and design.

In 2012, CEED II made a furniture market research according to which more than half of the furniture sold in Moldova is imported. This means that the majority of the furniture consumed in Moldova is made elsewhere. These facts combine to suggest that local producers were often not very successful in anticipating customer needs, in promoting their products and in communicating the advantages they have to offer to the market. To eliminate this disadvantage, CEED II supported in May-December 2013 the" Made in Moldova" awareness campaign. This campaign continued in participants' stores, where campaign brochures were distributed, as well as on the internet, being promoted on the campaign website and the Facebook pages of the association, the participant companies and CEED II. This campaign is ongoing and it teaches consumers how to choose their furniture correctly, how to judge quality furniture, what to ask retailers when buying furniture; it also reinforces the fact that quality furniture is made in Moldova. Once MOBIMALL (the furniture center that unites Moldovan furniture producers) was open, campaign brochures were also distributed inside the mall. Another goal of the campaign is to indirectly combat the phenomena of illegal furniture production and imports. The message of the campaign was communicated via 13 billboards (10 in Chisinau and 3 in Cahul, Balti and Ungheni respectively), 6 light boxes, articles in 4 popular newspapers, on Association's Facebook page, a brochure disseminated in members' stores, and campaign website.

**Problems Encountered & Solutions:** Local producers still have a lot of room for improvement both in the design of their product as well as in their professional communication with the market. As such, during the years of CEED II assistance, the sector made a major step by consolidating its effort to promote Moldovan furniture and united to create Mobimall – the furniture center for all Moldovan furniture producers.

## D. Information Technology Industry

### Activity 1: Adapting ICT education to industry needs

**Accomplishments:** In Year 4, CEED II was actively involved in the educational initiatives, aimed at increasing the IT workforce capacity. The interventions of CEED II project in this field were focused on expanding Cisco IT Essentials and Cisco Certified Entry Networking Technician (CCENT) courses, designing the first IT Excellence Center, launching the Robotics program and updating the informatics curriculum for secondary education.

*Expansion of Cisco IT Essentials courses.* CEED II continued to successfully expand IT Essentials as an optional course in high schools. In order to ensure the future expansion and continuous promotion of the IT Essentials optional course in Moldovan high schools, CEED II held consultations with Liliana Nicolaescu-Onofrei, Vice Minister of Education, Vitalie Bordeniuc, DNT Association Director, and Grigore Vasilache, the main Training of Trainers (ToT) IT Information Technology Essentials (ITE) instructor. The objective was to find a sustainable mechanism to provide ToT on IT Essentials for new school teachers willing to become Cisco ITE trainers, as well as to recertify those already certified. The ToT instructors could be provided by DNT Association, as the official Cisco Instructor Training Center in Moldova. Both CEED II and DNT Association agreed that DNT should take the lead for continuous monitoring and promotion of the Cisco IT Essentials course in Moldova, including in high schools. CTICE (Center of Information Technologies and Communication in Education), the main state institution specialized in retraining and qualification of school teachers, was assigned to take over the ToT for ITE course and has included the ITE course in their list of approved courses and started teaching it since the beginning of the year 2014.

On February 8, 2014 CEED II together with the Finance and Banking College, organized a special reunion of IT Essentials (ITE) teachers, in order to explain them the differences of the new 5$^{th}$ version of the curricula, updated by Cisco and in force since the beginning of 2014. As result, 40 teachers were retrained.

CEED II together with Moldovan Association of Private ICT Companies (ATIC) identified 2 major IT companies: Endava and Cedacri, available to host the visit of the best ITE students and graduates.

Figure 21. The group of students and teachers after visiting IT company Cedacri

The students from outside Chisinau from the 11-12th years were invited, being selected based on their results at the ITE tests. The purpose of the visits was to showcase the benefits of working in an IT company, thus motivating the youngsters to further pursue a career in IT. These company visits took place on March 11, 2014. The best 60 students and teachers participated at the event, and were very impressed by the working environments and conditions of Endava and Cedacri, which inspired them to choose a career in IT and aspire to work in one of these companies.

During the Year 4 of the CEED II project, (academic year 2013/2014 and the beginning of academic year 2014-2015) 62 institutions were added to the existing ones, 75 teachers were trained, and around 2600 students have been enrolled for ITE courses. Thus, from the beginning of the implementation of ITE initiative, over 3700 students were enrolled from 123 institutions from Chisinau and the regions.

Table 3. ITE initiative in numbers

| Indicators | 2009-2010 | 2010-2011 | 2011-2012 | 2012-2013 | 2013-2014 | 2014-2015 | TOTAL |
|---|---|---|---|---|---|---|---|
| **Number of institutions involved** | 8 | 15 | 11 | 27 | 42 | 20 | **123** |
| **Number of teachers trained** | 16 | 27 | 16 | 33 | 48 | 27 | **167** |
| **Number of students enrolled** | 220 | 156 | 149 | 609 | 1661 | 928 | **3723** |

*Cisco Certified Entry Networking Technician (CCENT) courses*. CEED II continued to work jointly with Cisco Networking Academy on the ToT for Cisco Certified Entry Networking Technician. Teachers finished their training sessions, and afterwards 9 trainers successfully passed the exams and got CCENT certification. Thus, the instructors of ITE have raised their qualification and obtained the right to be instructors for the next level after the CISCO IT Essential - CCENT courses. Prior to that, the educational institutions represented by the teachers, trained on CCENT during June –November 2013, were acting under the Financial Banking College local Cisco Academy. This was a good motivation towards a higher organizational level, creating independent local Cisco Academies at the educational institutions they represent. This will offer them a higher level of autonomy.

**Tex Box 2. New Cisco Local Academies**

*1. Pedagogical and industrial College, Cahul*
*2. Constantin Stere Lyceum, Soroca*
*3. Ion Creanga Lyceum, Popestii de Sus village*
*4. Mihai Eminescu Lyceum, Balti*
*5. Mircea Eliade Lyceum, Chisinau*
*6. B. P. Hasdeu State University, Cahul*

*IT Excellence Center*. As an IT Excellence Center is an important part of the ecosystem, contributing to the development of the ICT sector in Moldova, CEED II decided to mediate the negotiation process among various stakeholders, potentially interested in joining efforts to support this initiative. Discussions have been held with potential donors (i.e. USAID, SIDA) and multinational companies (i.e. IBM, Microsoft, Ericsson) to become partners with the Technical University of Moldova (UTM) and create the 1st Excellence Center.

The project identified the need to develop a concept for the envisioned Learning and Innovation Hub (IHub) for ICT skills and technologies. The IHub concept would be used to ensure a common vision and plan for this center for all participating partners, and to get buy in of all counterparts, including donors, multinational corporations, academia, and government. CEED II hired two international consultants, Bagrat Yengibaryan and John O'Sullivan, previously involved in similar initiatives and aware of the current situation in Moldova. The consultants visited Moldova and worked on the development of the concept for the envisioned Learning and Innovation Hub for ICT skills and technologies or IT Center of Excellence (ITCE) at the Technical University of Moldova (TUM). They held several meetings with representatives of private sector, donors, government officials and TUM administration. The ITCE draft concept was presented at USAID office to several most important stakeholders. The Minister of Education, the Vice-Minister of ICT, the director of e-Gov Center,

representatives of World Bank, SIDA, TUM, Microsoft, HP and others have attended the presentation and have all agreed to combine efforts in this initiative.

USAID has expressed its willingness to fund the ITCE at the initial stage. The negotiations have advanced with Microsoft and IBM, which expressed their interest to involve as major partners in the ITCE, contributing with curricula, trainers, software licenses, hardware and other. A Memorandum of Understanding was drafted and submitted to the partners for review.

Later on, the consultants Bagrat Yengibaryan and John O'Sullivan finalized and submitted the concept for the IT Center of Excellence. CEED II continued the consultations with the strategic partners on the drafted MoU, in order to define the contributions of each partner. Commitments of Microsoft and IBM have been agreed with their official representatives. The Government of Moldova has expressed strong commitment and support for the initiative.

CEED II finalized the consultations with the main strategic partners on the MoU, defined the contributions of all the partners, agreed with the main counterparts on the dates and worked on the organization of the official signing ceremony. The MoU was signed on September 26, 2014 by the Prime-Minister of Moldova (countersigned by the Minister of ICT, Minister of Education, rector of the Technical University of Moldova), the USAID Country Director and the regional directors of Microsoft and IBM. According to this MoU, USAID committed to allocate USD$2 millionfor the development of the Excellence Center, which will be leveraged with some other USD$2 million in private and public investment.

Figure 22. Official Signing of the MoU for IT Center of Excellence, September 26, 2014

*Robotics.* CEED II included a new educational initiative on Robotics, and together with ATIC looked for successful regional initiatives and potential partners for the implementation of the Robotics program. As an effective Robotics program was seen in Armenia, during the study visit, the Armenian counterparts provided details on their program, including financial implications and timing for implementation. While researching other regional experience in the field, a partner was identified in Estonia, NGO Robootika, which is implementing Robotics program since 2007 and has opened over 130 robotics clubs in Estonian schools. The Estonian model is using an international education program from a major vendor, Lego Education. This educational program is supported also by a US Foundation FIRST, working since 1989 to inspire young people's interest and participation in science and technology.

CEED II together with ATIC worked at implementing the program, attracting other partners and additional funding. The Ministry of Education willingly gave their approval for the pilot project to be implemented at the National Center for Children and Youth, also known as ARTICO. CEED II decided to offer financial support to other 2 institutions to establish Robotics clubs: The Poly-Technical College from Chisinau and the Theoretical Lyceum Orizontul. The partners agreed to name this initiative "Roboclub".

On March 25, 2014, a press conference announcing the launch of the pilot Robotics club was held at ARTICO as a result of a joint effort of all the partners. The conference got a very high interest from the local media, and around 15 articles and reports were published as a result, including video reports on several national TV channels. This raised a very high interest to the public, and immediately after the press conference ARTICO started receiving applications from parents of children, willing to take part in the robotics clubs.

On March 26-27, 2014 a Training of Trainers on Robotics was conducted by representatives from NGO Robootika at ARTICOThe Ministry of Education helped to identify informatics teachers interested to attend the ToT. 21 people attended the training, of which "Artico" will select teachers to be hired at the pilot Robotics club. Teachers from the other two institutions included in the pilot project also attended the training, as well as other interested people.

After the official launch of the "Roboclub" pilot project in March 2014, the ARTICO Center for Children and Youth hired two of the best participants at the ToT to be instructors at the newly opened club. It immediately started to attract potential attendees and had very good media coverage, as it is a first and unique initiative of its kind in Moldova. In April 2014, ARTICO organized an open demo lesson, attended by over 40 parents with children interested to join the Roboclub. During the first

Figure 23. Training of Trainers on Robotics at the Center for Children and Youth ARTICO, March 26-27, 2014

lesson of the first group of children, one TV channel (Jurnal TV) made a live report and interviews with attendees and trainers. More children have joined since. Over 70 children have been enrolled for Robotics classes at ARTICO in spring 2014.

ARTICO continued to promote their Roboclub at various events and public locations. They have also included Robotics in the program of their children summer camp, thus over 700 children attended demo lessons and got familiar with the Robotics activity.

The other two institutions to which CEED II provides financial support for the Robotics club, the Polytechnic College from Chisinau and the Theoretical High school Orizontul, planned to implement the full program during the new academic year, starting with September. The Poly-technical College from Chisinau has decided to include Robotics as a course in their main curricula for the Year 1 students and to continue working with them during the Year 2. Thus, they will be able to maximize the impact of the activity and provide a high return on investment.

A second round of Training of Trainers was organized at ARTICO on May 15-16, 2014, with the participation of 6 informatics teachers from colleges and high schools, willing to enter the program. The training was conducted by Heilo Altin, the main trainer from Estonian partner Robootika, assisted by a local trainer Adrian Chicu.

Also, CEED II organized a presentation of the Robotics implementation experience in Estonia during the Moldova ICT Summit, at the ICT4Education track, attended by around 100 representatives of the academia, Ministry of Education, media etc. During the event, Starnet, a private internet provider, announced its intent to join the Robotics initiative and offered support for purchasing additional robotics kits for 2 high schools selected by the company - High schools Mihai Grecu and Ion Creanga from Chisinau. Later on CEED II decided to support one more theoretical lyceum to open a Roboclub (TL “M.Eliade”). Therefore, currently there are 6 educational institutions included in the Robotics program.

Figure 24. Class at Roboclub inside the Center for Children and Youth ARTICO

CEED II was committed to continue the support to Robotics clubs including the development of the brand identity and promo

materials, as well as a design of the Roboclub location, to provide an environment stimulating creative thinking and collaboration. Also, CEED II developed the promotional poster for Roboclubs with contact information from each pilot institution. The posters will be used to attract participants in Roboclubs in the beginning of the new academic year.

The project has signed MoUs with Artico and the Poly-Technical College from Chisinau, included in the pilot project, for the extended support. The MoUs provide that CEED II would help redesign and furnish the facilities of Roboclubs, while the host institution had to repair it, in order to create an attractive learning environment, stimulating creativity and ensuring greatest learning outcomes. The two institutions repaired the facilities, and CEED II ordered the furniture and decoration items according to the refurbishment concept. The renewed facilities are planned to be ready in October.

In September 2014 the activity of the Roboclubs was restarted, and they have attracted participants for the new academic year. Thus, 60 children (split in 4 groups) have restarted the regular classes at ARTICO, 54 at the participating lyceums and another 60 students from the Robotics club at the Poly-Technical College from Chisinau.

*IT Curriculum*. CEED II project decided to support the Ministry of Education in updating the Informatics curriculum, used for lower and upper general education. The commitments of the parties have been bound by a MoU, signed between CEED II director, Doina Nistor, and Maia Sandu, the Minister of Education, on July 16, 2014. Afterwards, the Ministry of Education issued an order, stipulating the creation of the working group for the revision and update of the Informatics curriculum. The working group consists of 25 school teachers of Informatics, representatives of the higher education and private sector.

A team of 3 local experts, with extensive experience in developing informatics curriculum was identified and contracted (Anatol Gremalschi, Grigore Vasilache and Arcadi Malearovici). An international expert – Mart Laanpere, Senior researcher, head of the Center for Educational Technology Institute of Informatics from Tallin University, Estonia, was contracted to guide the local team and provide recommendations based on the international experience and the recent advances in IT. The experts guided the working group and were be responsible for the development of the Informatics curriculum for lower and upper secondary general education, according to the standards of the Ministry of Education.

A workshop was organized on July 23-24, 2014 for the working group, in order to present the international experience in the field of informatics didactics and to brainstorm on the changes necessary to make the curriculum used in Moldova more relevant. The workshop was conducted by Mart Laanpere and Anatol Gremalschi. 24 people attended the event. As a result, a curriculum framework was developed and distributed for review.

After finalizing the proposed curriculum it was approved by the Ministry of Education for implementation in a number of institutions as a pilot project during the academic year 2014-2015 and a selection of pilot institutions was held.

It was previously agreed that a number of 25 institutions would be included in the pilot project and up to 30 teachers would get trained. However, the educational institutions demonstrated a high interest for this initiative and a number of 60 institutions were identified. CEED II decided to expand its support for all those institutions. The training of teachers from the institutions included in the project was conducted in the second half of September 2014. The teachers were split in 3 groups, and the training took place in Chisinau for 2 groups of teachers and in Cantemir for the third one. A total number of 66 teachers were trained, of which 44 from outside of Chisinau.

**Problems Encountered & Solutions:** CEED II encountered no major problems in implementing the educational initiatives. In fact, it had a very fruitful cooperation with all the partners involved.

### Activity 2: Supporting an IT Career promotion campaign

**Accomplishments:** CEED II successfully implemented another powerful campaign to promote careers in ICT, targeting high school students who are considering what fields of higher education to pursue, as well as university students preparing to enter the labor market. CEED II communications efforts reached over 2 millions of people, as the video spot promoting IT Career was broadcasted on 4 national TV channels and the promo banner was placed on 7 most popular local websites. Around 1000 students had the opportunity to interact with representatives from 9 major IT companies, their potential future employers. 6 success stories in IT and a series of 21 materials (articles and video coverages) were produced and published on high traffic websites: unimedia.info, diez.md, allmoldova.md.

*ICT Career Orientation days*. ICT Career Orientation days is a series of events organized on a yearly basis by the National Association of the Private ICT Companies with the support of the CEED II and the Ministry of Youth and Sports and other partners. The purpose of this initiative is to guide future graduates into career development opportunities offered by the ICT sector, through presentations by private companies.

Figure 25. ICT Career orientation day at the Technical University of Moldova, November 14, 2013

The 2013 ICT Career Orientation events were held at 3 institutions: Technical University of Moldova, on November 6, State University of Moldova, on November 7, and Academy of Economic Studies, on November 14, 2013. 9 important ICT companies participated in the event: Allied Testing, Endava, Pentalog, DAAC System Integrator, Trimetrica, Deeplace, Moldcell, Cedacri International, Red Sky. The students had the unique opportunity to learn firsthand about the aspects of a successful career and the main requirements of employers.

ICT Career Orientation days were structured in two directions: Career orientation sessions and exhibition of the companies in the hall, where students were able to interact directly with their potential employers and find out more information about internship opportunities, job openings and requirements towards candidates.

The events agenda included orientation sessions on different topics such as Software development, Mastering the Testing Diversity, Test Automation Engineer vs Developer, Agile, Career opportunities for developers in current IT trends, Code refactoring, SQL, Geographic Information Systems, Modern web development & e-commerce, Unified Communications, and QA Engineer job interview. All the presentations were held by highly qualified and experienced IT professionals from participating companies. Around 1,000 students from the Technical University of Moldova, State University of Moldova, Academy of Economic Studies and other educational institutions attended the events.

*ICT Career Promotion campaign.* CEED II supported ATIC efforts to promote the IT Career as an attractive option for the younger generations and orient talented pupils towards ICT specialties. The main onjective is to encourage students at the ICT faculties and VET institutions to show a stronger engagement for the chosen career path, to access more extracurricular learning opportunities, launch and carry out independent projects – undertake active actions that would help them gain knowledge and develop important skills for their future employment.

The media campaign started in July 2014, after the end of the school year and start of the university admission period. The promotion campaign included TV and online promotion, publishing of success stories and relevant news, and active dialogue with young people through social networks. The video was broadcasted on prime-time on the main TV channels: Moldova 1, ProTV, Acasa TV, and Jurnal TV. Four success stories in IT were produced and published online. Their purpose was to promote IT career opportunities based on real success experience and encourage young people to consider the possibility of embracing IT specialties. CEED II cost-shared the costs of broadcasting the video spot on ProTV and AcasaTV, as well as on the sites belonging to ProDigital group (protv.md, perfecte.md, totul.md, noi.md and profm.md). Also, CEED II covered the costs of the advertising services on Unimedia.md, Facebook and Google display. Other costs were covered by ATIC through a grant from the Ministry of Youth and Sports or their own resources.

A series of articles were produced and published in order to promote the newly launched ICT specialty within 2 vocational institutions - "Operator pentru suportul tehnic al calculatoarelor" (Computer support operator) and to encourage young people to apply for it. The launch of a new ICT specialty was an initiative carried out within the Project "Advancing quality in ICT vocational education in Moldova", implemented by EC PRO DIDACTICA and the National Association of Private ICT Companies with the support of the Austrian Development Agency with the Austrian Cooperation Funds. Taking into consideration the need to reach the target audience living in the rural area, 2 articles were produced and published in “Jurnal de Chisinau” and “Saptamina” newspapers, known for having the widest national coverage and the largest print run: 9000 and 7500 copies respectively.

Within the online campaign, banner ads "Choose a career in IT" were placed on high traffic websites like unimedia.md, protv.md, profm.md, diez.md, totul.md, perfecte.md, and noi.md. Also, Google AdWords and Facebook ads were used as an effective tool to promote the IT career campaign messages. Considering the growing impact of the social media, the new tools were used in order to promote the IT career. ATIC is continuously updating “I choose the IT Career” (“Aleg Cariera IT”) Facebook page and group.

The video spot was broadcasted on 4 TV channels (Moldova 1, ProTV, Acasa TV, and Jurnal TV). Online campaign involved placing banner ads "Choose a career in IT" on 7 high traffic websites: unimedia.md, protv.md, profm.md, diez.md, totul.md, perfecte.md, noi.md. The “Aleg Cariera IT” page on Facebook registered 1000 new likes. 6 success stories in IT were produced and published online during July 1 to October 1, 2014. A series of 21 materials (articles and video coverages) were produced and published on high traffic websites: unimedia.info, diez.md, allmoldova.md. The total reach of the media campaign through all promotional channels included in the media plan is estimated at two million people.

**Problems Encountered & Solutions:** CEED II had not encountered any problems in implementing this activity. ATIC had demonstrated increased leadership and was able to attract additional resources to ensure the sustainability of the ICT career related activity. Initially, CEED II planned to support the IT Career promotion campaign from the beginning of 2014, but thanks to a grant provided by the Ministry of Youth, ATIC was able to conduct a large number of such presentations in autumn 2013, thus CEED II was involved only since July 2014. Additionally, CEED II intended to support ATIC to develop the new ICT Carreer website, but ATIC once again managed to attract all necessary funding, this time from the Austrian Development Agency.

### Activity 3: Developing entrepreneurship culture in IT

**Accomplishments**: CEED II continued to support the development of an entrepreneurial culture by organizing the 5th edition of the Startup Weekend Moldova event, The Startup Roadmap workshop, Technovation Challenge contest, Startup Ecosystem round table and Student Startup Camp.

*Startup Weekend Moldova.* CEED II successfully ran the 5th edition of Startup Weekend Moldova (SWM) on November 15-17, 2013, during the Global Entrepreneurship Week. Orange Moldova and Simpals Garage supported the event, providing pre- and post-event PR, as well as prizes for winners, while the French Alliance in Moldova offered a venue, i.e. several training rooms perfectly suitable for working in teams, as the event format requires. Other sponsors contributed with prizes for participants and winners and with media support. The event attracted both foreign mentors and judges.

Figure 26. SWM5 winning team awarded prizes from main sponsors

The event gathered 80 participants (25 developers, 10 designers, 19 non-technical, 16 observers, 10 students), 28 ideas were pitched, 13 teams were formed and 9 coaches helped the teams work on their ideas. During the final stage, 7 judges evaluated the progress of teams and the viability of ideas and selected the winners. The event was truly international as it gathered representatives of 8 countries: Moldova, Romania, Russia, Czech Republic, USA, UK, France, and Lithuania. The event was a big success in terms of sustainability as around 70% of attendees paid for their participation tickets.

As a result of CEED II's continuous work to develop an entrepreneurial culture in IT, this year, for the first time, a team of young aspiring tech entrepreneurs from Moldova went to Bucharest, for Startup Weekend Romania. The team previously attended several Startup Weekend Moldova events and won one. The team proposed a project called Fantique - a service that helps users find clothes and accessories that suit their personality. They had an outstanding performance at Startup Weekend Romania and were awarded the 1st prize, receiving very positive feedback from the judges, as being

the best organized team with the greatest results achieved during the weekend and the best final presentation. At the event, a Romanian entrepreneur joined the Moldovan team and they are currently working on launching their project in Romania.

On December 12, 2013, CEED II organized a follow-up meeting with the 5th edition of SWM attendees in order to discuss their progress, plans and challenges. One of the SWM5 coaches and judges, Daniel Ray, attended the meeting and provided useful feedback to the teams, helping them expand their projects further and overcome certain barriers that they faced.

Later on, CEED II decided to organize the 6th edition of the Startup Weekend Moldova during the Global Entrepreneurship Week, on November 14-16, 2014. The date was agreed with the partners: Orange, Simpals, ATIC. CEED II started working on the organization of the event. The event location chosen was the same as the last edition, as it provides the best conditions for the event.

*The Startup Roadmap workshop.* To follow up on the success of Startup Weekend Moldova and to sustain the enthusiasm of the young startup community, CEED II decided to organize "The Startup Roadmap - Explore, Design, Build, Grow", a series of workshops for aspiring tech entrepreneurs. This series is facilitated by Daniel Ray – a serial entrepreneur, investor, and experienced coach at a number of Startup Weekend events in several countries. This initiative is part of a series of educational activities called Startup Academy, which is run internationally by StartKarma – a nonprofit organization focused on strengthening the startup ecosystem in emerging markets.

The first part of the workshop (Explore and Design) took place on December 14-15, 2013, gathering 25 participants. The feedback collected at the end proved the workshop was very useful to all attendees and offered relevant knowledge and tools for the development of their ideas into viable startups. The second part of the workshop took place on March 1-2, 2014 and was attended by 30 people. The feedback from participants was very good; all of them found the information provided and the advices received from the trainer very useful, practical and relevant.

For promotion purposes, CEED II developed a video with testimonials from the attendees of the first part of the workshop, in order to ensure a higher participation at the event. In addition, CEED II developed a video with interviews of the trainer and the participants of the second part of the workshop. This material will be used for promotion of the future similar events.

Figure 27. The Startup Roadmap workshop for aspiring tech entrepreneurs

*Technovation Challenge.* CEED II joined efforts with the Peace Corps volunteers, which organized for the first time in Moldova the Technovation Challenge - a global tech competition that teaches girls how to code, build an online application, and build a business around that application. Having started

Figure 28. Moldovan winning team and the competition jury on stage during the award ceremony of the World Pitch Technovation Challenge 2014

in 2010, this competition now includes girls from 24 American states and 19 countries in the world. The competition is supported by technology leaders from Google, Twitter, MIT Media Lab, Dropbox, and Andreessen Horowitz.

This year, for the first time, the Republic of Moldova entered the global competition. On May 3, 2014 CEED II supported the organization of the local final pitching event, where 7 teams of girls from Chisinau, Causeni, Soroca, Stefanesti and Stefan Voda presented their apps in front of a jury. All the teams also submitted their video presentations for the global competition and the team from Stefanesti, Floresti, with their application "Health in a Drop" (a solution for finding clean water) was selected as a regional winner and was included in the Top 10 finalists in the global competition.

The team went to Silicon Valley for the World Pitch event, where representatives of 5 continents pitched their apps in front of a professional jury at Intel's premises. As a result, "Health in a Drop" became the winner of the Technovation Challenge 2014 in high school division. The news about Moldovan team winning at the global mobile app startup completion for young women attracted a lot of interest from the community and from the media. Several articles and interviews with the team members were published in the local media (Prime, Jurnal TV, Agora, Allfun, Diez, Adevarul,Stiri Pozitive, etc.)

*Startup Ecosystem round table.* After the Moldova ICT Summit, CEED II organized an informal roundtable to discuss the current Startup Ecosystem status quo in Moldova and in the region. The event was moderated by Anca Albu, founder of the CEE Changers from UK and speaker at Moldova ICT Summit. Several other foreign speakers of the Summit, startup founders, attended the event and

provided their opinions on the subject. A total of 20 people joined the event. Representatives of the Moldovan government and the local startup community had a good dialogue, and networked.

*Student Startup Camp.* CEED II worked with the Estonian foundation Garage48 and the Technical University of Moldova to organize the first Student Startup Camp – a one-week practical interdisciplinary entrepreneurship course aimed at providing students with necessary skills and confidence to launch technology-related businesses. CEED II decided to provide partial funding for the event. Garage48 foundation is supposed to fundraise for the missing budget in Estonia. Initially the possible dates for the event were set for September 2014, but later it was agreed upon to organize the Student Startup Camp in November 2014 and to leverage the resources by organizing another Startup Weekend Moldova event in the following days, thus having the mentors from Garage48 involved in the Startup Weekend Moldova.

**Problems Encountered & Solutions:** CEED II encountered no major problems in implementing this activity, except that it still had to lead most of the efforts in promoting the entrepreneurial culture. Even though several partners have joined the initiatives, their resources did not allow CEED II to reduce its involvement, while fulling taking over the organization of the envisioned events.

### Activity 4: Support Organization of ICT Summit

**Accomplishments:** With CEED II and other partners' support, ATIC successfully implemented the 2014 Moldova ICT Summit (5th edition). The event was successfully organized on May 13-15, 2014 and was attended by around 1000 people. It attracted 70 speakers from 20 countries. The Summit was organized at a very high level, and the official opening was held by the Minister of ICT, Prime Minister of Moldova, Deputy Ambassador of US, Vice President of the Parliament, General Manager of Microsoft CEE New Markets and President of ATIC. The ICT Summit banners were posted on the websites of 13 ministries and state institutions.

The 5th edition of Moldova ICT Summit had big media coverage, with over 90 articles published in the most important media channels from Moldova (TV, radio, online and printed newspapers).

Moldova ICT Summit 2014 was organized by the National Association of Private ICT Companies, Ministry of

Figure 29. Official opening of Moldova ICT Summit 2014
*Top picture, from left to right*: Pavel Filip, Minister of ICT; Iurie Leanca, Prime Minister of Moldova; and Veaceslav Kunev, President of ATIC
Bottom picture, from left to right: Pilar Tores, General Manager, Microsoft CEE New Markets; Kara C. McDonald, Deputy Chief of Mission; Adrian Candu, Deputy Speaker of the Parliament of RM; and Valeriu Lazar, Vice-Prime Minister, Minister of Economy

Information and Communications Technology and USAID CEED II Project, in partnership with the Center for Electronic Governance, MIEPO, Ministry of Education, Microsoft, Orange, DAAC System Integrator, HP, Endava, Intel, Unibank, Deeplace and other partners.

CEED II led the ICT4Entrepreneurs track of Moldova ICT Summit, Powered by "How to Web". The Romanian team of "How to Web Conference" helped define the agenda of the respective section and invited several speakers. Other speakers have been contracted by CEED II directly, including local representatives of successful IT businesses. The track consisted of 4 sessions, of which 3 sessions were talks, and 1session had 2 panel discussions. Nine speakers from the US, UK, Lithuania, Estonia, Germany, Romania and Moldova gave inspirational talks, presenting regional startup ecosystem and their own experience in developing successful startups. Around 150 people attended this track of the Summit. Afterwards, the attendees provided very positive feedback on the quality of the content and speakers.

**Problems Encountered & Solutions:** CEED II did not encounter major issues in implementing this activity.

## Activity 5: Enhancing Competitiveness of the IT industry

**Accomplishments:** During Year 4, CEED II continued its efforts in supporting the development of the ICT industry, promoting Moldova in the region as an IT destination and a reliable IT partner, as stated by IDC. CEED II supported a Moldovan delegation study visit to Armenia to attend several important IT events and have a twinning on the Armenian IT ecosystem; the participation at a B2B event in Sweden and at the CeBIT exhibition in Germany. CEED II worked with the Ministry of ICT on the finalization of the ICT Strategy and Implementation Agency concept, as well as the analysis of the fiscal incentives for the IT Parks.

*Study visit to Armenia.* CEED II supported a Moldovan delegation to Armenia to build trade linkages and share experiences for ICT industry competitiveness, to promote Moldova as an IT destination, as well as to explore ideas and opportunities for developing the ICT ecosystem in Moldova,. The delegation consisted of the Vice Minister of ICT, Vice Minister of Education, representatives of ATIC, and the ICT business community. In October 4-8, 2013 the delegation attended Armtech 2013, DIGITEC and BSEC Member States ICT High-Level Conference, and visited more than 10 institutions, excellence centers, private companies, including Armenian counterpart Ministries and Associations. This visit inspired the Moldovan delegation, which came back with a clearer vision on the development directions that Moldova needs to keep to, as well as several constructive ideas on how the Moldovan IT ecosystem can be built.

*B2B event in Sweden.* CEED II supported ATIC to attend a specialized B2B event in Kista, Sweden, which took place on November 21, 2013. The event was organized by SEEBA, a business development consultancy and the on-site facilitator. It's primarily focused on helping companies develop business between Scandinavian and South Eastern European countries by identifying potential buyers, business partners, distributors, and suppliers on the market. The event aimed to help participants develop business opportunities, establish government contacts, find potential suppliers and business partners, and to overcome various barriers, mainly by providing proper information and success stories. The IT /Media companies from SEE countries: Croatia, Serbia, Bosnia and Herzegovina, Kosovo, Macedonia and Moldova had the possibility to meet up with Nordic potential customers and to present success cases and the advantages of choosing SEE as an IT services destination. More than 90 people representing companies from SEE countries and Sweden, as well asrepresentatives of different embassies and business organizations, attended the event.

The Moldovan delegation at the event consisted of three people: Viorica Bordei, ATIC Project Manager, Andrian Gavrilita, Team Leader at Investment Attraction Team, Prime Minister's Office and Andrei Sedelcov, were invited as industry experts. The Moldovan team presented the business prospects, opportunities and advantages of contracting IT services to Moldova, making a special

emphasis on the strengths, such as experienced companies, geographic proximity, and cultural affinity and compatibility with Europe, and competitive IT labor force.

*CeBIT Expo.* CEED II held several consultations with MTIC and MIEPO to discuss the usefulness of participating at CeBIT – the world's most important IT business event, taking place in Hanover, Germany, on March 10-14, 2014. The project also worked with ATIC to identify IT companies, potentially interested in exhibiting at CeBIT. As a result, two companies have expressed their interest: Alfa Soft and Netinfo. CEED II with ATIC, MIEPO and other partners worked on preparations for the exhibition.

The 2014 CeBIT fair focused on IT infrastructure and business directions, communications, navigation, transport and logistics, public consumption sector, innovations and finance in Internet and mobile communication sphere, electronics for consumers. The Moldovan delegation was composed of: Viorica Bordei, ATIC Education Project Manager, Iurie Coroban, CEO, AlfaSoft company and ATIC member, Andrian Gavrilita, Team Leader of the Investment Attraction Team, Adrian Ciofu, Investment Attraction Officer.

During the exhibition Moldovan delegation had a series of meetings with potential investors and held discussions regarding the possibility of contracting services delivered by the Moldovan IT companies or initiate collaborations in areas of common interest. Among them we can mention the meetings with the representatives of national business associations: Romanian employers' association of the software and services industry (ANIS); Union of IT Enterprises from Armenia; and the IT Association from Azerbaijan. The discussions focused on the opportunity of launching initiatives related to experience sharing, knowledge transfer, but also common projects in the field of education, promotion and trade.

Also, the delegation met with foreign entrepreneurs interested in the Moldovan investment opportunities: a Polish company dealing with telecommunications systems interested in the possibility to create a local branch in Moldova; an Indian software company analyzing the opportunity of transferring a part of the team to Moldova due to the distance proximity with the EU countries; and a German company showing interest for collaboration opportunities in the development of the products and services dedicated to the public sector etc.

Overall, the participation of ATIC at CeBIT was successful, a first experience of international exposure at such an event. Taking into consideration the relevance of the event, and also the great promotion opportunities it provides, ATIC decided to invest more efforts in order to communicate the benefits of participation and convince its members to join the next editions of the event.

*ICT Competitiveness Strategy and Implementation Agency.* The draft ICT Industry Competitiveness Strategy, previously circulated for public review, got several comments regarding its content, namely pointing to the lack of an Action Plan to support the initiatives described in the strategy. As a result of the experience exchange in Armenia, the vice minister of ICT, Vitalie Tarlev, presented to the Ministry of ICT (MTIC) the successful example of the Armenian ICT Agency, thus stimulating more detailed discussions on the Moldovan concept of the ICT implementation Agency. Meanwhile, the Ministry of ICT is considering to expand the scope of the ICT Competitiveness Strategy and the concept of an Implementation Agency, by preparing several additional government actions to be conducted in parallel with the launch of the ICT Industry Competitiveness Strategy and implementation Agency, such as a draft law on IT parks and fiscal incentives for micro size companies or individuals with economic activity in the IT sector.

CEED II decided to support these governmental initiatives and contracted Sergiu Rabii, a local consultant to assist MTIC refine the ICT Competitiveness Strategy and the Implementation Agency concept and regulation; as well as analyze the existing models of fiscal incentives of IT parks and propose feasible options as an input for the economic reasoning of the IT parks Law, to be drafted

further. These 3 documents were included in the “Competitiveness package”, consisting of the ICT Sector Competitiveness Strategy, the Concept of the implementing agency and the law on IT Parks.

CEED II consultant, Sergiu Rabii, continued to hold consultations with the Ministry of ICT and the team from PWC, hired by MICT to finalize the analysis of the fiscal incentives for the IT Parks, to be considered for the draft law on IT parks. The final drafts of the documents were published on the MTIC website and presented at a dedicated session on Moldova ICT Summit. According to the legal procedure for such documents, MTIC collected reviews from state institutions, associations and private sector representatives. The “Competitiveness package” has to be presented for Government approval. In September, the Minister of ICT decided to present at the Government meeting only the draft IT Parks Law. This got positive feedback from other Ministers and approved by the Government. Now, according to the official procedure, the law awaits approval from the Parliament.

**Problems Encountered & Solutions:** While implementing the B2B event and preparing for the exhibition, CEED II was faced with a shortage of marketing capacity from the IT companies and the ICT Association, which resulted in low participation and an insufficient number of trade linkages during the events. ATIC has increased its team (hired more people) as it realized the shortage of skills and the need for specialization within the team. Regarding the exhibition, lesson learned: to start preparations much earlier and involve in helping the companies with the marketing. While working on the “Competitiveness package”, the only issue was the difficult and bureaucratic official procedure for collecting reviews and getting the documents approved.

### Activity 6: Capacity building for ATIC

**Accomplishments:** During Year 4, CEED II further strengthened ATIC’s institutional capacity, had worked on the promotion of the B2B portal and preparing ATIC for future implementation of the IT Excellence Center.

*B2B portal.* CEED II continued to work together with ATIC on the improvement of the membership/ registration and on the promotion of the B2B portal of Moldovan ICT companies.

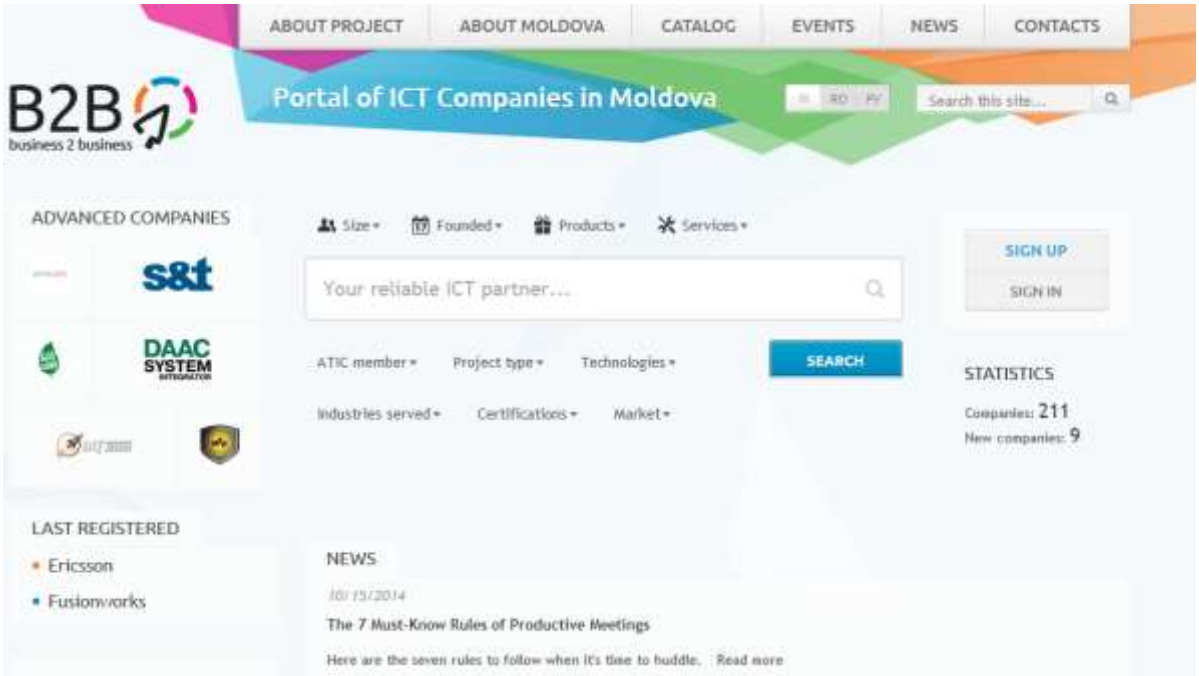



Figure 30. Home page of the Business 2 Business (B2B) portal http://b2b.ict.md/

In order to increase the number of users and traffic to this portal, a service provider was contracted to perform a smart SEO (search engine optimization) before starting a large promotional campaign. The audit report was provided in December 2014 and contained valuable recommendations for improving the search engine rankings, accessibility and the visibility of the B2B portal. Improvements and optimization will be done during the next months. Meanwhile, in order to increase the interest in and traffic to the web portal, a promotion campaign on Facebook and Google AdWords was launched.

While working with ATIC on the promotion of the B2B portal, several fixes and corrections have been implemented, aimed to improve the functionality of the portal and the search engine rankings. ATIC hired a content manager, responsible for the development of the portal and she started to work on increasing the number of subscribed ICT companies. Since the launch of the portal, 211 companies from different sub-sectors of ICT have been registered.

*IT Excellence Center.* While working on the concept of the IT Center of Excellence, ATIC was considered the best option as an implementing partner. However, its current internal organization needed to be revised, and some procedures redefined, to be in line with the USAID requirements. CEED II offered support to resolve this issue and identified a consultant to work with ATIC to review and improve their organizational documents, written policies and manuals. Further on, CEED II helped ATIC develop other document in compliance with the USAID procedure for direct grantees.

**Problems Encountered & Solutions:** One major problem CEED II encountered while working with ATIC was the lack of human resources. However, during the Year 4 the organization supplemented its executive team with two additional members and in general we had a great cooperation on most of our common activities. Another issue was related to the promotional efforts of the B2B portal – they were delayed, as several modifications to the functionalities were identified and had to be implemented before launching the promotion.

## E. Tourism- An Emerging Industry

### Activity 1: Establish Inbound Tourism Association

**Accomplishments:** To consolidate the tourism industry environment and to help the tourism industry have a strong voice in promoting its activities, CEED II successfully supported the creation of an inbound tourism association. The National Inbound Tourism Association of Moldova (ANTRIM) was officially registered at the Ministry of Justice on January 16, 2014 having as founding members 8 tourism service providers: Tehno AB (Butuceni), Infoturism Group (Amadeus), Solei Turism, Tatra Bis, Rosh-Consult, Vila Verde Hotel, Volare Tur (Jazz Hotel) and Branesti Winery.

CEED II started its dedicated work in this direction in October 2013 when discussion with future association members started together with the process of preparation of the documents for registration. That same month, CEED II prepared and placed the job announcement for the position of the Executive Director. As result, 4 people applied for this position and in December 2013, CEED II assisted the board members to organize job interviews and to select the best candidate, Ms. Natalia Turcanu. Thus, at the end of December 2013, the documents were submitted to the Ministry of Justice for the association registration. The association was registered in January 16, 2014 and started to fully activate quickly becoming the main field association promoting Moldova as a tourism destination.

Figure 31. Logo of inbound tourism association created in January 2014

To help the association become a strong industry voice, CEED II

allowed ANTRIM to use the Moldova Holiday logo and brandbook, which was developed with the input from its members. Thus, its ownership will be transferred from CEED II to ANTRIM at the end of the project. To achieve this goal, CEED II contracted RT Design that made all the appropriate changes to integrate ANTRIM in its logo and brandbook. To further support the development of the association, CEED II supported the development of the official association's web-site www.antrim.md, that was launched in April 2014. This made the association more visible and accessible for potential members and partners.

CEED II involved the newly created association in many activities organized at the local and international level, thus enhancing its contribution to the tourism industry development and building its capacity. In this respect, following activities have been implemented in partnership with ANTRIM and other parties involved: organization of "New Product Development" seminar and a Master Class on wine tourism, both in February 2014; organization of three promotional events "Experience Moldova" in London, Berlin and Stockholm, in May 2014; organization of the "Green Run" event in July 2014. Additionally, CEED II supported ANTRIM's initiative to print 25,000 "Hello Chisinau" free maps, which were disseminated at the airport from Chisinau and at the hotels, restaurants and cafés from Moldova.

Due to CEED II initiative, ANTRIM started to build strong partnerships. During 2014, ANTRIM director participated or organized rounds of meetings with donor institutions, public authorities and sectorial NGOs. Additionally, ANTRIM found a local partner, Etnogastronimica NGO, to participate at a project financed by EBRD in the sector of the development of a Rural Tourism Network in Moldova. All documents for the grant attribution for 2015-2017 were submitted in July 2014, and in December 2014 ANTRIM will know the final result.

All ANTRIM efforts have been appreciated by its members and the association managed to attract 4 new members: Chateau Vartely, Asconi, COB Consulting (Hai la Tara) and Trip to Moldova (Visit East Europe).

**Problems Encountered & Solutions:** During the past year, all of the planned activities were successfully implemented.

### Activity 2: Further improvements of Moldova Holiday website and promotion in target markets

**Accomplishments:** During the reported year, CEED II succesfully supported a series of promotional campaigns and finalised important technical improvements for Moldova Holiday website.
In order to increase Moldova Holiday audience, as a part of Moldova Holiday promotion in target

Figure 32. A promotion poster on Facebook showing Moldova as a tourism destinationon Facebook

markets, in November-December 2013, CEED II in partnership with Carpatair, Jazz Hotel and Tatrabis organized a Facebook competition "Win a weekend in Moldova" targeting the UK market. The advertising reached 29,371 people. The social media itself reached 123,000 people. As a result, Moldova Holiday gained 869 new Facebook friends, of which 600 were from the UK.

The prize was "A Moldovan mini break", with air fare, hotel, a visit to Cricova and a tour of Orheiul Vechi included. The winners, Michelle and Timothy Olley, were selected through random.com. The two visited Moldova during April 5-8, 2014 to celebrate their 25th wedding anniversary. They have discovered the most popular tourism attractions in Moldova—Chateau Vartely, Orheiul Vechi, and Butuceni Pension—and were deeply impressed by what Moldova can offer in terms of tourism experiences. To share impressions about their adventures in Moldova, they gave an interview to a local online publication, allfun.md.

**Text Box 3. Testimonials from UK tourists about Moldova**

*"We've seen only friendliness, kindness and inspiring beauty. We fell in love with Moldova. We had a great guide who told us many interesting things. Most importantly - we saw "live" history. We are going to tell everyone how great Moldova is."*

*Michelle and Timothy Olley, winners of Moldovaholiday.travel Facebook competition*

Another Facebook promotional campaign was organized in February 2014 to engage local young people in Moldova Holiday activities, and make the local audience aware of Moldovan tourism attractions or to discover new unknown interesting places. CEED II together with the Jazz Hotel organized a Facebook contest to find out "What place is the most romantic in Moldova?" The contest was organized during Valentine's Day celebration. Through paid advertisement, during 4 days of competition, the page was viewed by 18,464 visitors and 54 new likes were gained.

*Moldovaholiday.travel technical updates.* In order to constantly increase the impact of the moldovaholiday.travel website on the industry development and to improve it, there were defined a series of needed technical updates: migration to Joomla 3.0, integration of Russian, Romanian, German and French languages, integration of the commercial zone, update to Search Engine Optimization, event's calendar and etc. In order to support this activity, CEED II contracted RT Design and during April-June 2014 the company did all the requested improvements: implementing Romanian and Russian languages, and concentrating forward on other improvements of new version of the site. The new version of the site was finalized in September 2014 being accessible for large public. It has a modern design and an attractive content and the information is more accessible and easier to find. Additionally, it includes a commercial zone, where local tour operators are able to sell their tours exclusively to Moldova.

To make moldovaholiday.travel a source of inspiration for potential visitors from France and Germany, Germany being defined as #1 target market for Moldovan tourism, CEED II developed partnerships with French Alliance and German Society for International Cooperation, GIZ, to support translation of Moldova Holiday into French and German. The translation of the site content in German is in process while the French version was finalized in September and will be included on the site in the following months.

*Development of the Mobile Application Moldova Holiday.* Along with the Moldova Holiday web-site, in April 2014 CEED II decided to support the development of a new mobile application, as now most of the tourists who visit Moldova are self-touring visitors. The existing tourism mobile applications about Moldova are not supported by all the platforms (Android, IOS and Windows Phone) and each of them covers only specific areas of tourism. The new tourism mobile application will represent a mobile version of Moldova Holiday. CEED II contracted Muzic Access to

**Text Box 4. Fop 50 attractions in Moldova for mobile application**

- ✓ 8 wineries
- ✓ 19 churches and monasteries
- ✓ 3 cave monasteries
- ✓ 6 fortresses and estates
- ✓ 9 museums
- ✓ 5 monuments

develop the application. The fifty most important tourism attractions in Moldova were also defined, and will be included in the application. The contractor received all the content information and elaborated the first version of the application, which has been approved by CEED II.

**Problems Encountered & Solutions:** The development of the Moldova Holiday mobile application was planned to be finalized during year 4, but due to some internal issues in the work of the contracted company, the deadline of launching the application was twice delayed. Additionally, ANTRIM took the leadership in the project's implementation and due to its involvement in many activities, was not strict with the deadlines. It remains ANTRIM's task to provide the developers with all the needed support for the finalization of the work by the end of 2014.

### Activity 3. Support participations in trade shows in target markets

**Accomplishments:** During the reporting period, CEED II helped local tourism companies participate in international exhibitions to promote Moldova as a tourism destination, establish new partnerships and increase the number of tourists visiting Moldova.

*Participation at Tour Salon Exhibition.* In October 17-19, 2013, CEED II supported a delegation of Moldovan tour operators, Amadeus Travel, Tatra Bis, Solei Turism, to exhibit at Tour Salon in Poznan, Poland. Tour Salon is an important exhibition, as Poland is one of our target markets for wine tourism and tourism in general. During the exhibition, the Moldovan delegation presented Moldova's tourism offer at a common stand under the Moldova Holiday brand. All the exhibitors had the possibility to meet directly with their potential partners and establish further partnerships. As a result, the companies created joint tours for Moldova –Ukraine and gathered groups. Due to the political situation in the region, a part of the planned groups were cancelled and only few of them visited Moldova and Western part of Ukraine.

*CMT Stuttgart exhibition*. CEED II supported a delegation of Moldovan tour operators, Amadeus

Figure 33. Moldova's stand at CMT, the biggest consumer tourism exhibition in the world. January 2014.

Travel, Tatra Bis, Solei Turism and Volare Tur to exhibit at CMT in Stuttgart, Germany in January 11-19, 2014. CMT is the biggest consumer tourism exhibition in the world with a record number of 241,000 visitors in 2014.

During the exhibition, the Moldovan delegation presented Moldova's tourism offer at a common stand under the Moldova Holiday brand. All the exhibitors had the possibility to meet directly with their potential customers and invite people who are interested in discovering new tourism destinations, to visit Moldova in the upcoming season. For the second time, CEED II organized a press conference for 20 travel journalists from the world's most popular travel magazines. As a result, one journalist participated in Fall Fam Tour and a series of articles appeared in the specialized media.

*ITB Berlin 2014 press conference organization.* In March 5-9, 2014 in Berlin there took place the most important B2B event of the tourism industry. Moldovan companies -- Tatrabis, Solei-Turism, Amadeus Travel, Trip to Moldova, Chateau Vartely, and My Planet Tour -- participated at this exhibition for the sixth time, as usual with a stand. In order to have a bigger impact, CEED II organized for the first time a press conference that contracted the German PR Agency, Xenos-Comm. More than 30 journalists have participated at the press conference and showed interest in Moldova and its tourism attractions. The representatives of all participating companies, as well as the National Tourism Agency Director, Nicolae Platon, had the possibility to present their offers and discuss the positive impact on local tourism development as result of European integration. Every year more and more German tour operators are looking to sell Moldova as a tourism destination, and the press conference emphasized once again the interest in Moldova. As a result, Chateau Vartely was able to establish good contacts with German, Romanian, Slovak, Polish and even American tour operators. In particular, many people were interested not only in wine tours, but also combined: rural, cultural and wine. While at the exhibition, Tatrabis got reservations for 6 groups of tourists: 4 groups for 2014 and 2 groups in 2015.

*Participation at 6th Annual International Wine Tourism Conference, IWINETC 2014.*On March 29-30, 2014 in Tbilisi, Georgia, was held IWINETC, the only international event dedicated to the sale of wine tourism products.

**MOLDOVA WINE TOURISM presentation**
**at International Wine Tourism Conference in Tbilisi, 2014**

Figure 34. The 6th Annual International Wine Tourism Conference, IWINETC 2014

CEED II supported the participation of Mrs. Veronica Raetchi-Tomescu, at that time Managing Director of ”Chateau Vartely” Travel Agency, and Board Member of the National Inbound Tourism Association of Moldova (ANTRIM), by covering the airline ticket cost.

Mrs. Veronica Raetchi-Tomescu was invited as a speaker at the Conference, being the first representative of Moldova who participated at this event. Her presentation “Republic of Moldova - an emerging wine tourism destination” focused on the appearance of new wine destinations, development of the national program Moldovan Wine Route and alignment of the wine and touristic industry to a common promotion and development strategy. In addition, Mrs. Veronica Raetchi-Tomescu developed a short presentation of the Moldova Holiday project as a success story of the tourism industry. As a result, Mrs. Tomescu had established many contacts with representatives of wine tourism agencies from all around the world.

*Promotional Roadshow with Live Concerts of Ethnic Moldovan Music organized*. To support the development of tourism in Moldova and increase awareness about Moldova as a tourism destination, CEED II supported the organization of 3 Live Concerts of Moldovan Ethnic Music in target markets: Germany, Sweden and Great Britain. These countries were selected due to their interest in Moldovan tourism offer: rural, cultural, gastronomic, wine and soft adventure tourism. Many partners were attracted to support CEED II’s initiative: ANTRIM, Ministry of Culture, Moldovan Embassy in UK, Moldovan Embassy in Germany, Moldovan Embassy in Sweden, and MIEPO, as well as the logistic partner, Sens Music. These events were positioned as promotional platforms not only for tourism sector, but also for Moldova in general, a country with perspective and good investment environment having both B2B and B2C purposes.

A well-known Stefanet Brothers Orchestra and a famous local singer, Geta Burlacu, were selected to sing, as they were considered the best representatives of Moldovan culture. The events started with the video "Moldova: a new tourist destination" and was followed by the concert with authentic ethnic music. The concerts took place in Berlin on May 13, 2014; in Stockholm on May 15, 2014; and in London on May 16, 2014.

Along with the concerts, were organized wine tastings with Moldovan wines, to promote the country brand ”Wine of Moldova”, as well as wine tourism. Special for these events, CEED II developed a promo brochure which was given to each guest, highlighting the general tourism offer and specific thematic tours in Moldova. More than 700 people attended the events and participated in the wine tastings, among them were potential partners, media representatives, investors, representatives of diplomatic missions and many other people who showed interest in visiting Moldova. Three local TV channels made video reports about the shows.

Figure 35. Live Concerts of Ethnic Moldovan Music organized in London on May 16, 2014, Royal Institution of Great Britain and its promotional poster

**Problems Encountered & Solutions:** As promotional concerts in the target markets in this format, (not targeting only the diaspora) were organized for the first time, it was a bit difficult to find ways to attract foreign guests. But with the support from the diaspora and Moldovan Embassies, the project was able to target appropriate guests to attend the concerts. Also, through a deep analysis of the most popular online ticket sales website for this type of concerts, the best sites were selected in each country and promoted, so everyone who was interested in Moldovan culture and wine could attend the concerts.

## Activity 4. Organize familiarization (fam) tours for foreign tour operators and journalists

**Accomplishment**s: During the Year 4, CEED II organized familiarization tours for foreign tour operators and journalists, as well as helped local tour operators organize individual familiarization tours. These efforts helped Moldova build its image as a tourism destination, and helped local operators increase their sales.

Figure 36 . Moldova in a French specialized magazine

*Familiarization tour for journalists and tour operators*. CEED II organized in October 2013 a familiarization tour for 9 journalists and tour operators from Canada, France, UK, Estonia and Romania. Among them were writers from" Eat, Drink, Travel", and "Get lost" magazines, and the director of the Baltic Triangle publishing house in Estonia. Besides the fact that the tour was specifically organized to coincide with National Wine Day celebration, all participants had the chance to visit the most interesting sights in Moldova and Transnistria and to get familiar with Moldovan culture, wines, and gastronomy. All feedback was positive. As a result, two articles appeared in "Horizont" magazine in France and "Krasivaia Jizni" magazine in Estonia. Another fam tour participant, Michelle Holmes, who is a travel writer and a blogger, wrote a small introduction about Moldova on her blog back home in Canada and three articles in "Eat, Drink, Travel" online magazine on the Moldovan gastronomy, wines and tourism attractions. Patrick Kinsella, wrote an article about Moldovan Wines on www.cnn.com in the travel section. Moreover, as a result of participation of

foreign tour operators in the fam tour, our local partner Tatrabis had two groups of 10 people each from France in October and November 2013.

In April 2014, CEED II supported the visit for a fam trip of a freelance photo-reporter from France, Eric Pasquier. Mr. Pasquier wrote an 8-page article in "PRESTIGIEUX Univers" magazine, which appeared in September 2014, on the underground wine cities, which are unique in the world, covering the 3 wineries: Cricova, Milestii Mici and Branesti. Allmoldova wrote an article about his visit emphasizing that journalists are so interested in our country due to the unique places and experiences it can offer to its visitors.

*Organization of individual familiarization tours.* In May-June 2014, CEED II supported the organization of individual familiarization tours for foreign tour operators in order to set up new partnerships for Moldovan companies with foreign agencies. Six foreign tour operators visited Moldova in individual familiarization trips, namely Ikarus Tours GmbH, Orion Reisen, Ventus Reisen GmbH, Regent Holidays, Parallela 45 and Eberhardt Travel GmbH. The local tour operators registered the following results:

- Tatrabis started to work with Eberhardt Travel GmbH from Germany, whose representative visited Moldova in June 7-10, 2014 and started selling for the first time tours through them beginning September 2014. The tours were placed on their website.
- Amadeus Travel had 2 partners participate in familiarization tours during May 15-19. Partners from IKARUS TOURS GmbH had many customers and found interesting places to extend their offer. Partner from Orion Reisen was very pleased with organized trip because the fam tour allowed him to better understand how to build a program for the trip, booking hotels, choice of restaurants for tourists, right "load" of attractions. After the fam tour, Orion Reisen extended the program from 4 days to 7 days stay in Moldova and created a separate wine tour for professionals in the wine industry, which they will launch in 2015.
- Voiaj International had partners from Regent Holidays from UK for the beginning; the representative wrote an article about Moldova which was published in the companies' catalogue. Also, Voiaj International organized a fam trip for Parallela 45 and are working on the first group for 2015.
- Solei Turism was visited by the partners from Ventus Reisen GmbH Germany to strengthen their collaboration. Till now, the German company collaborated with Solei Turism only occasionally, by contracting "transit short programs" delivered based on individual requests. Following the fam tour organized with CEED II support, the German partner decided to intensify the collaboration with Moldovan partner and to promote Moldova on their market as a new tourism destination, offering weekly packages.

**Text Box 5. Testimonials on Moldovan tourism offer from a Fam tour participant**

*"It was a very interesting and meaningful trip, as we were able to get a picture of the country ourselves, which is always important to make it sell better as a destination."*

*Mr. Schneider, Produkt Manager, IKARUS TOURS GmbH*

**Problems Encountered & Solutions:** All planned activities were finalized successfully.

### Activity 5. Improve Moldovan tourism's online profile and help develop selected websites

**Accomplishments:** CEED II dedicated its efforts to improve the online profile of Moldovan tourism operators and support the development of a website for Vatra Cultural Center.

*Internet marketing training for local tour operators*. CEED II organized in November 2013 a one-day training on Internet Marketing Best Practices for the mini grant program beneficiaries in 2013, for marketing managers from local tour operators, wineries and event management companies. During the training, 17 participants had the possibility to analyze their websites and understand how these

correspond to the basic rules of a good website, learn what are and how to use internet marketing tools like Google Analytics, Newsletter, Remarketing, SEO and AdWords. Moreover, the participants found out how important online marketing in social media is. They learned step by step actions to do these kind of activities and they even used their credit cards to start promote their business online during the class. They noticed the results right away by getting new fans and engaging them in company's activities.

*Website development.*CEED II decided to support the development of one web-site for Vatra Cultural Center. This is a unique cultural project "Moldova – European Culture and Destiny" being an absolute premiere for Moldova and with a strong national and international resonance. The project will take place at the Ethno-cultural Complex VATRA - a specially designed place for large scale events. The purpose of this project is to promote the image of Moldova at European level through artistic values and cultural management. Furthermore, this project demonstrated that there is an opportunity to create and develop business on local cultural segment. The web-site www.vatrafest.md was launched in April 2104 and presents different events that will took place and will be organized yearly, the most important of them being five exceptional festivals: Medieval Festival, The Dialogues of Love, VATRA Ethno-Balkan, Ethno-cultural Festival "Autumn Paradise", Ethno-Folkloric Festival "Christmas Village". The Medieval festival" took place on 28-29 June 2014 and had around 20.000 visitors and Ethno-Balcanic Festival had around 15.000 visitors. The big audience during the first event, meaning positive effects on tourism, was one of the direct results of the successful development of the web-site.

Successful implementation of the project generate positive effects on tourism, culture and economy and will have a positive impact on society facilitating public access to different forms of cultural and artistic expression.

**Problems Encountered & Solutions:** No major problems encountered.

### Activity 6. Tourism attraction improvement and new products development

**Accomplishments:** CEED II registered important progress in helping the Moldova tourism industry to create new products and improve existing attractions**.**

Figure 37. The first trip with the tour trolley in Chisinau

*First Tour Trolley launched in Chisinau.* CEED II supported NTA's idea for a new pilot project - guided tours with the first sightseeing trolley in Chisinau. This new initiative increased general public interest in tourism. Since all the capitals in the European countries have such buses, and Chisinau has many historical attractions to show, CEED II financed the designing of the trolley, transforming a usual trolley into a real red sightseeing trolley. The tour trolley was launched on August 27, 2014 -

Moldova's Independence Day, and had a huge interest from the media, as well as local people who were very excited to discover the city they live in. The tour trolleys run every Sunday until the Chisinau Day Celebration. The excursions are free of charge as this is a partnership between the NTA and the Chisinau City Hall. ANTRIM and the Chisinau Major are now in discussions to find a long-term solution as the project was very well received and people are looking for it to continue.

*New Product Development*. CEED II together with National Inbound Tourism Association of Moldova (ANTRIM) organized a two day workshop on "New Product Development & Market Leadership Positioning for Moldovan Tourism". The seminar took place on February 26- 27, 2014 and was led by Jack Delf, an international tourism expert. Fourteen participants from tourism agencies, wineries, rural pensions and MIEPO, learned how to turn creative ideas into desirable, distinctive, market ready tourism products. As a result, 5 new unique ideas were exposed and will be developed in real tourism products: Dacian days -get back in time, Build a house in Moldova, Cycling in the last piece of Soviet Union, The battle of winemakers, Fly me to Moldova. Following the two day workshop "New Product Development & Market Leadership Positioning for Moldovan Tourism" with Jack Delf, organized in February by CEED II jointly with the ANTRIM, the participating companies started to sell distinctive experiences:

Figure 38. TatraBis new product poster

- Tatrabis company launched "Ideas for weekend", a series of new products for local market. The first "Lavender perfume as in Provence and sarmale from Lalova", a packed excursion which took place on June 20 gathered 18 participants. The next one "Live the championship emotions" will take place on July 19, and is an excursion to Tighina Fortress and Sheriff Stadium in Tiraspol, as well as free beer. Other three new products will be launched by the end of summer.
- Explore Moldova launched a tour for adventure tourism "Trojan's wall and Lower Prut" which took place for the first time during May 9-11.
- Solei Turism is developing "Sweet Moldova" product, were visitors will be able to make their own jam with local fruits picked by themselves and local recipes and take it back as a souvenir. This will also imply a visit to the famous "Bucuria" factory.

*New concept of and new touristic products for Wine Day*. As national Wine Day is a major touristic event, during the 2013 edition of the National Wine Day Wine, wine trips were organized. For this year, the wine industry came up with a new concept regarding the celebration of Wine Day, and the promotion of wine tourism was included as a target. To this effect, CEED II came up with a new initiative: to have promo packages to the most popular wineries around Moldova, in order to promote wine tourism for both, local and foreign visitors of the festival. After having had at least two meetings with the wineries, tour agencies and the NTA, NTA took over and organized the further presence of the tour agencies at the festival. Six tourism agencies, Panda Tur, Excursie, Axios Turism, Solei Turism, Moldova Tur, Kokopelli Tour, decided to participate together with the NTA at this initiative and be present at the event under the same tent. As a result, 700 people visited Cricova, Milestii Mici, Chateau Vartely, Purcari, Branesti and Migdal-P wineries paying prices ranging from 115 to 160 MDL, thus directly increasing the sales of wineries and tour operators.

*Master class "Wine- a touristic guide" organized during Wine School*. CEED II, together with ANTRIM and Jazz Hotel, organized on February 20, 2014 a master class about wine and tourism as a

part of Wine School classes at Moldexpo. The speakers were Veronica Tomescu, expert in wine tourism and Mihai Druta, sommelier. More than 40 wine and tourism lovers have participated in the master class and learned about wine tourism and how you can travel and get to know a country through its wine.

*Support creation of local events and new product development*. In year 4, CEED II supported the promotion and organization of several events as well as new tourism development programs:

- "IA Mania" event. "IA Mania" the biggest festival of arts borne out of cultural traditions and authentic folklore took place on June 2014 in Holercani Village. The objective was to strengthen the national identity, promote local traditions and attract tourists to Moldova. IA Mania was a successful event, well organized and appreciated by all the participants and guests of the festival. CEED II supported online promotion of the event and as a result the event counted around 6000 people: about 1,000 participants, gastronomy, crafts (10 special guest from Romania), and artists; 3500 - tickets sold, about 1000 organizational team, about 1,500 guests, including representatives from Chinese Embassy, first Lady Margareta Timofti.

Figure 39. Ia Mania Event

- Green Run event. In July 2014, Explore Moldova together with ANTRIM and supported by CEED II, successfully organized the Green Run event in Rezina district. The main objective of the event was to promote healthy lifestyle through adventure tourism, discovering new beautiful landscapes around Moldova, since the event location is different every year. This cultural and sports event was at its second edition and got a lot of attention from the local and the international community. During the two-day races, 66 people

Figure 40. US Ambassador William H. Moser participating in the Green Run bike ride in July 2014, an event promoting a healthy lifestyle through adventure tourism.

participated in the sports event and more than 400 people enjoyed local cuisine, a handicraft exhibition and a concert with local artists.

- *New product development coaching program on gastronomic and cultural tourism.* On September 24-25, 2014 CEED II organized a follow-up product development coaching program on gastronomic and cultural tourism, leaded by the International Tourism Expert Jack Delf. 10 Participants from wineries, tour operators, agro pensions and other tourism service providers had the possibility to learn and try the best practices on new types of tourism and the best-selling tourism offers on the international market. All the participants were inspired by what they have learned and are now working on developing new creative tour packages.

Figure 41. Practical classes for gastronomy and cultural tourism (cooking claas and dance class) in September 2014.

*Looking for new attractions and opportunities in tourism.* In year 4, CEED II looked to identify new attractions in Moldova. In this respect, project representatives organised meetings with different organisations interested in developing tourism in Moldova. In this respect, CEED II made the following activities:

- Gagauzia routes. In order to find and develop new attractions in Moldova, in June 2014, the international consultant Jack Delf took a day trip to the south of Moldova to visit Gagauzia. His itinerary included the renovated Bostovan winery, a horse stud farmer (for trotting horses), and a carpet and handicraft museum. As a result of his visit, Mr. Delf wrote a follow-up email giving recommendation and sharing "Brand Moldova" paper as it distills the key attractions and obstacles together with the expectation we wish to create in the minds of potential travelers.

- Mimi wine tourism. Mimi, a winery with old traditions producing high quality wines, plans to extend their products, building a chateau for wine tourism. CEED II tourism expert, Mr. Jack Delf, visited in June 2014 the Mimi winery to write an overview and recommendations on what needs to be developed and taken into consideration while starting to sell wine tours. Moreover, during his visit in Chisinau in September, Jack Delf, had a follow up meeting with Mimi executives and presented them the tourism product development strategy and the business plan.

- Forest areas integration into tourism routes. In July 2014, CEED II organized a one-day training session with the US Forest Service Representatives on Recreation Planning and Public Engagement. Representatives of local NGOs, tourism agencies, guides, Moldovan forest authorities and representatives of game reserves met to discuss their day-to-day challenges and learn about US experience on how to develop recreational tourism in forests without damaging the nature. On July 12, 2014 the US Forest Agency, the Moldovan Forest Service - Moldsilva, CEED II and ANTRIM representatives took a field trip to the game reserve "Plaiul Fagului", a closed-type natural reserve that offers hiking tours and has the capacity to develop more attractive products ( i.e. camping, fishing, biking routes, etc.) and sell them to tour operators. Following the workshop, the participants expressed their interest in developing new products around the forest. CEED II received a highly positive feedback from ANTRIM members who got very interested in the development of new products in forests around Moldova. To this end, ANTRIM started discussions with Moldsilva to sign an agreement for a long-term collaboration to integrate the forest areas/natural reservations in the tourism routes by developing recreational activities in these areas to attract both domestic and foreign visitors, by conducting inventory of recreational capacity of the forests, especially hunting, fishing and ecotourism, to draw routes and travel itineraries, developing the infrastructure and thus creating sources of income for the local population.

- Religious tourism. Religious tourism is one of the types of tourism that has a big potential in Moldova. All monasteries are placed in picturesque places and represent important bridges to Moldovan culture, traditions and behaviors. In February 2014,CEED II organized a meeting with Jack Delf, CEED II, ANTRIM and Metropolitan representatives to discuss ways of collaboration. The discussions mainly focused on: integrating the monasteries in the existing routes offered by touristic companies, promotion of the religious tourism for pilgrimage, development of audio-guiding in the biggest and most popular monasteries and the creation of a religious tourism office that will coordinate the touristic flow in the monasteries and churches around Moldova.

**Problems Encountered & Solutions:** No major problems encountered.

## Activity 7. Assistance in developing new policy in tourism sector and generic promotion tools

**Accomplishments:** During year 4 CEED II supported a wide range of projects initiated by the National Tourism Agency as well as other activities to enhance industry collaboration.

*Support First Hotel Forum.* In December 2013, the National Hotel and Restaurant Association organized the first hotel forum in Moldova, gathering 61 participants. CEED II supported this activity as it is an important start for those who work in hospitality sector, which is closely related to the tourism sector. The purpose of this event was to raise awareness of local authorities about the problems faced by hoteliers in the country and see the experience of hoteliers from abroad. One of the most important issues discussed at this event was the reduction of VAT for hotel services down to 8%. Trainers from Moldova, Ukraine, and Russia informed Moldovan hoteliers about the latest global achievements in this area, the ways to avoid problems in the hospitality business, how to increase revenue and raise the level of customer service in hotels, how to raise loyalty among customers through loyalty programs, and showed how important it is to have high skilled staff, etc. The forum gathered 64 hotel directors and top managers from all around the country.

*Development of Moldova Tourism Industry Marketing Strategy and Promotion Plan.* CEED II supported the review of Tourism Development Strategy 2020, by contracting Mr. Jack Delf, an international tourism expert, in October 2013. In November 2013 the review was presented during a joint meeting for the NTA and private sector representatives. All suggestions made by Mr. Delf were well-received and most of them were included in the final version of the strategy. The Strategy was approved by the Government in May of 2014 and now is in process of implementation. CEED II supported the translation of it into English, to be used for investments attractions and a living document in the collaborations with international organizations and donors. At the same time, Moldova Tourism Development Strategy 2020 doesn't contain a Marketing Plan, this being an important promotion tool for the least known country in Europe as Moldova is known in terms of tourism destination. Thus, CEED II additionally contracted Jack Delf, to develop a marketing plan and strategy that will include an overview of world trends in tourism, Moldova's touristic product offer, key markets for Moldovan tourism, and a tactical marketing action plan for 3 years, including a timetable for the proposed list of tactical marketing and promotion actions for each market with budget estimates. The marketing strategy and plan will be developed as a public-private effort, engaging both the National Tourism Agency and the National Inbound Tourism Association. The first draft of the plan with target markets was presented to the companies from tourism sector as well as to the National Tourism Agency.

*Tourism promotion video.* NTA has contracted N4 TV to develop 20-second and 6-minute videos, the short one to be used for promotion on international TV channels and the wider one to be screened during exhibitions. In January, the 20-second video was presented to the public and received harsh criticism from civil society. Representatives from different fields like marketing, movie makers, tourism, NTA and just enthusiastic people have participated in a very unusual initiative, workshop to make a better video. More than 50 people shared their ideas and seven new concepts were developed. People had the possibility to vote at the end and the most liked concept will be used to create the new version of the spot. CEED II consultant, Eugen Boico, presented the new concept to the public sector, CEED II and ANT during a meeting. All the counterparts agreed on the proposed concept, and following Mr. Boico's recommendations, the NTA gave empowerment to CEED II team to work with N4 and Mr. Boico and make the necessary adjustments to the 30-second promotional video, in line with Moldova's positioning. Since the company didn't have enough interesting and high quality video footages, they reached to a talented movie maker, Alex Bodilev who provided inspiring videos, as well as to Andrew Ryal, DJ number 28 in the world and a Moldovan, who provided his music for the spot. The voiceover was done by the UK Ambassador in Moldova, Phil Batson. It was decided to present the 50 seconds video to the public during a press conference on August 4. That happened after

the video was presented to the opinion formers and bloggers on July 31, 2014 and the general opinion and the feedback was impressive, as all the participants appreciated the new spot with positive comments. Around 15 TV and online channels wrote about the new spot. Meanwhile, the video was published on the Moldova Holiday Youtube channel and during the first week it had 40,000 views. Along with this video, NRG Media finalized the development of the 30-second and the 6-minutes video.

Figure 42. Image from the promotional video

*Private – public partnership.* CEED II focused on the development of a good partnership between private and public sector representatives. As result, a private-public partnership was established. Two meetings with NTA and private sector were organized by CEED II and were established the points of partnership that will help Moldova's tourism to develop: visual change of the tourism logo based on the tourism USP (Unique Sales Proposition-Moldova will offer unique experiences through preservation and promotion of cultural and historical values, through hospitality and high quality services) that is a part of the marketing plan and the creation of a better promotional video taking into consideration all the recommendation from tourism sector representatives. Additionally, on August 29, 2014, CEED II and NTA signed a Memorandum of Cooperation by which both parties committed to join efforts in the new tourism country brand development and the elaboration of the marketing strategy that will emphasize joint actions to promote Moldova as a tourist destination as well as to consolidate sector actions.

*Improvement of tourism industry statistics*. Quantifying the tourism industry and its contribution to the national economy is key, in order to track the development of this industry and its impact. However, the official statistical data and methods for the tourism industry is deficient and not aligned with the EU methodology and the methodology recommended by World Tourism Organization. As such, the National Tourism Agency initiated improvements regarding statistical data and methods. The key issue is that at the moment local statistic office does not account for all the visitors coming to the country, but only people entering Moldova as "formal" tourists (i.e. having purchased a tour through a tourism agency), as well as people who were accommodated in hotels and pensions. NTA is working with World Tourism Organization to beneficiate for consultancy in this field. CEED II decided to support NTA in this initiative finding a local statistic specialist to work with the WTO specialist to introduce the incoming and outgoing visitors' figures in the statistics.

*Development of Moldova country brand for tourism.* CEED II decided to support the National Tourism Agency through the creation of a new visual identity for the country image, which would correspond to the tourism offer. In this respect, a board was created, including NTA, CEED II and private sector representatives, and the tender was launched. The tourism country brand will include a new logotype and logo symbol, slogan in English, Romanian and Russian, the brand book and promotion attributes design. After the tender closed, 3 companies having submitted their proposals, the board selected Publicis Moldova to work on the creative ideas for the new tourism visual identity of the country. Meanwhile, the contracted company had developed the creative directions which were presented to private sector representative as well as opinion formers. After a round of other consultative meetings, CEED II together with NTA will launch the new brand.

**Problems Encountered & Solutions:** When CEED II changed its management and the National Tourism Agency has got a new Director, it was a bit problematic to establish any kind of dialogue, as the government authority didn't want any type of support. Nevertheless, with its high professionalism, CEED II managed to find the right communication methodology which established a very close partnership between the authority, private sector and the donor project which resulted in the successful implementation of many projects and other are following to be implemented.

## F. Wine Industry

### Activity 1: Support the establishment of the National Office for Wine and Vine (ONVV) and institutional development

**Accomplishments:** During the reporting period one of the main objectives of the CEED II project was to provide support to the establishment, launching of activities and to the strengthening of the new institution, the National Office for Wine and Vine (ONVV), accordingly to the statute approved by the Government in September 2013. CEED II assistance was very valuable to the wine sector and to the Ministry of Agriculture and Food Industry (MAFI), as it provided them with needed expertise in the following areas: the legal & regulatory framework related to the establishment of a new public institution (ONVV); the administrative organization and self management of the ONVV; the launching of its operational activities, and the strengthening of ONVV capacities and role within the wine industry and public administration.

To this end, in the first phase, CEED II project supported the MAFI and the ONVV Council for Coordination to legally organize the selection of the director, accordingly to the ONVV concept and the best practices, ensuring a transparent and competitive process. Consequently, with support from CEED II consultant and manager, ONVV Council approved the job description and candidate profile, a Regulation of Staff selection procedure, and successfully identified and contracted in December 2013 the first director of the ONVV, the former general director of Chateau Vartely, one leading winery of the sector. The newly appointed ONVV director has been publically presented to the press during the visit of the US secretary, Mr. John Kerry, on December 4, 2013.

In the next phase, CEED II oriented its assistance to providing the ONVV director and Council for Coordination with the regulations and documents needed for the administrative start-up of the ONVV functioning. In this regard, such institutional documents were developed and approved with CEED II support: the staffing scheme, the job descriptions, the remuneration regulation, the regulation of the Council for Coordination, the internal staff regulation, etc. Additionally, CEED II supported the ONVV Council and director in developing the public administration planning documents, such as the ONVV annual activity plan, and the ONVV annual budget of expenses, developed accordingly to the standards of the State Chancellery and the Ministry of Finance.

Following the settled framework, during January–March 2014, the ONVV started the staffing of its team, through a public transparent competition. As a result of a very competitive selection process, there were 3 times more candidates than vacancies, the ONVV employed 6 consultants in viticulture, wine traceability, marketing, PR & communication, and an accountant. In parallel with the

institutional establishment, the ONVV started to engage in its legal activities and became publically exposed to the communication with the Government authorities, but also wine sector associations, donor institutions and mass media.

The ONVV had been invited by the Prime Minister Iurie Leanca to several reunions on the wine industry situation, where it has represented the private sector interests and plans for addressing problems caused by the Russian wine embargo. During March 4-7, 2014, the ONVV director, Mr. Dumitru Munteanu has joined to the official delegation of the Prime Minister to the official visit to United States of America, where ONVV has established relations with the State trade department, wine institutions and associations, marketing and promotion agencies, needed for the preparation the Wine of Moldova trade mission to the USA in August 2014.

Figure 43. ONVV delegation in study visit to Austria

In order to improve the understanding of the ONVV scope and the public-private administration model, but also to consolidate an unique vision towards the ONVV activities, CEED II organized a study tour to Austria for the ONVV's newly formed team, the Coordination Council members and MAFI. The Moldovan delegation visited the similar Austrian Wine and Marketing Board and learned about their success in re-launching the wine exports after an international quality scandal about Austrian wines. Visits to the Austrian Ministry of Agriculture, the State Laboratory and to the Federal Wine Institute and Education center, small and big wineries were organized, which offered to the participants an extensive overview over the wine sector policies and initiatives that are key for a sustainable development of the wine sector. A new collaboration item was added to the MoU between the Moldovan and Austrian Ministries of Agriculture. In addition, ONVV team and Council have been convinced that the reform implemented in the Moldovan wine sector was truly the correct path, considering that the Austrian model was a source of inspiration for the regulatory and institutional modifications in Moldova.

Aiming to strengthen the ONVV capacities in developing, planning, implementing activities and measuring their results, in May 2014 CEED II engaged ONVV to develop an annual working plan of activities, the associated budget plan, the monitoring and evaluation (M&E) system, and a reporting framework, based on the western project management standards and following the wine sector policy documents. Two international experts, with expertise in project management standards and in international wine marketing, one local consultant and the wine industry manager worked together with the ONVV team and successfully developed the needed framework documents for an efficient organization of its operational activities. The set of documents, was approved by ONVV Coordination Council, and later presented to the wine industry reunion on July 4th, who endorsed the ONVV plans.

In addition, following CEED II recommendations, ONVV established specialized consultative platforms—the viticulture & winemaking council and the marketing council—in order to make their activity transparent, predictable and participative for the wine sector actors. The first reunions of the consultative platforms were organized in July-September 2014. ONVV was publically introduced and gained credibility due to the organization of the Moldovan trade mission to the USA in August 2014.

In the last quarter, CEED II support was focused on strengthening the role of the ONVV in the wine sector policy implementation, and in mediating the public-private dialogue on important issues related to the situation of the wine industry, in the context of the Russian embargo. Consequently, in order to raise public awareness about the sector's problems, the ONVV, with USAID CEED II support, developed a "Study on the financial situation of the wine sector and its actors in the context of the Russian embargo", publically presented on August 4th, 2014, and announced to the Prime Minister on behalf of the wine industry.

Also, with support from CEED II and from the Council of Coordination, the ONVV undertook the role of counterpart of the MAFI on the PGI/PDO subject. In this regard, the ONVV organized several reunions with the private sector stakeholders and the PGI association in order to define their position towards the MAFI model of PGI/PDO administration. The ONVV, with CEED II expertise, submitted written proposals for the modification of the draft Technical Regulation and participated to a dozen of meetings and reunions, including at the Government and Ministry of Economy.

Starting with August, CEED II advised ONVV to improve the public perception of its activities and to increase awareness about the role played in the wine sector. Consequently, CEED II assists ONVV in accessing professional PR & communication services, which has made a strong impact on the public presence of the public institution in the media, but also within the wine industry stakeholders.

**Problems Encountered & Solutions:** The implementation of the activity depended greatly on some administrative decisions, on behalf of the Government, MAFI, and Ministry of Finances, which delayed some planned actions and reduced the ONVV absorption capacity. Until the end of February 2014, the ONVV lacked financial resources, as there were difficulties with the accounts opening and the resources from the state budget have been transferred to its accounts in March, which delayed the staffing procedure and the procurement of office equipment, and identifying office facilities.

Also, CEED II project witnessed an unhelpful approach to the ONVV start-up on behalf of some MAFI employees, who stagnated the approval of needed decisions and created artificial problems related to the institutional establishment of the ONVV. This was partly due to their interest in integrating the ONVV staff, to which the ONVV responded negatively. The CEED II project supported the ONVV director and the sector representatives and has mediated meetings, discussions with the Minister of Agriculture, the Minister of Finances, and other officials in order to facilitate the ONVV activities.

Additionally, the ONVV Council for Coordination has had a difficult start-up, as the private sector representatives didn't had experience in working commonly and in partnership with the public servants, which caused some setbacks. CEED II worked together with them in building trust and

facilitating the communication, which finally resulted in approving the ONVV activity plan, budget and staffing scheme. The organization of the trainings for the ONVV staff wasn't yet planned, as the ONVV Council considered that his would be possible once the ONVV has a relevant experience and is 100% staffed. Also, due to limited human resources of the ONVV, CEED II couldn't provide them with the budget for the development of an intranet and web-portal, choosing to develop a presentation web-site, for a transitional period. The activity planned at Milestone 5 couldn't be organized as the final normative acts were not approved. Still, during meetings with the private sector, CEED II consultants informed them about the new legal framework and responded to their questions in this regard. Given MAFI and ONVV's different understanding of the PGI/PDO system, the new technical regulation couldn't be approved by the Government, and consequently, the full implementation of Milestone 3 was not achieveable.

### Activity 2. Support for the Wine Country Brand final developments and development of the Wine Country brand program components

**Accomplishments:** ***Wine of Moldova launch.*** During the reporting period, the Wine Country Brand (WCB) development process reached its final stage, culminating with the public revealing of the new visual identity, Wine of Moldova, by the U.S. Secretary of State, John Kerry, on December 4th, 2013. Both, the Secretary Kerry, and the Moldovan Prime Minister Leanca congratulated the wine sector for their recent successes, which are also the CEED II project successes.

In consequence, the Wine of Moldova logo and news about the new identity of the Moldovan wines has benefited of wide international and national media coverage, which raised the interest to the Moldovan wines and teased the local public community to learn more about the promotion program. CEED II project has had an important exposure and publicity given the achievements with the wine law reform and the new wine country brand launch.

Figure 44. Launch of Wine Country Brand, US Ambassador speech

With CEED II support, the Wine of Moldova program, including all its components, has been presented at a national launching event, on December 17th, 2013, within the special premises of the National Museum of Ethnography and Natural History, which matched the core values of the wine brand, featuring the Moldovan wine traditions, history, culture and complex approach in the wine production. A wine audience of the wine industry owners and leaders were present, alongside the Minister of Agriculture and Food Industry, the former Prime Minister, Mr. Vlad Filat and the US Ambassador, Mr. William H. Moser. The official guests highly appreciated the efforts made by the wine industry and the complexity of the Wine of Moldova (WoM) program, developed with CEED II support.

USAID
FROM THE AMERICAN PEOPLE

**Competitiveness Enhancement and Enterprise Development II (CEEDII)**

SNAPSHOT

# Promoting Reform in Moldova's Wine Industry

**USAID supports Moldova's wine industry to be more competitive—leading to increased exports and domestic sales**

PHOTO: USAID CEED II PROJECT
*Secretary of State John Kerry participated in the launch of a new national wine brand*

Wine is an important part of Moldovan daily life, and by most estimates, has been made on Moldova's land since 500 B.C. Roughly half of Moldovan families produce their own wine, and wine is present at most of life's celebrations from birthdays to religious holidays. The industry employs about 250,000 people and generates an estimated 5 percent of GDP and 7 percent of the country's exports. Yet, despite the cultural and economic importance of wine, the industry lacked robust sector-wide communication and public-private dialogue, which hampered its ability to modernize and be competitive.

To tackle this challenge and promote reforms in the wine sector, USAID is supporting the establishment of a National Office for Wine and Vine (ONVV), which will be responsible for sector administration and promotion of Moldovan wine abroad. ONVV is modeled after similar institutions in leading wine producing countries and is under the guidance of the Ministry of Agriculture and Food Industry (MAFI) but operates as a public-private partnership with joint management and funding through a national Fund for Wine and Vine. The establishment of this Office is an important step towards implementing changes in the wine and vine sector regulatory framework and the promotion of a national wine brand, which will increase sales and aid a key component of the Moldovan economy. The establishment of the ONVV is the culmination of nearly three years of work by USAID, the Government of Moldova, private wine companies and other wine sector stakeholders. USAID supported increased dialogue among public and private actors, which led to multiple wine sector associations in Moldova coming together with the Ministry of Agriculture to sign a Cooperation Agreement in March 2011, which declared their intent to promote fundamental reforms within the industry, and supported the Ministry to champion those reforms.

In order to develop a sustainable framework to boost the wine industry and to implement necessary reforms in a transparent and efficient manner, the wine industry, with support from USAID, promoted sweeping legal reforms for the sector. The wine reform legislation was passed by Parliament in 2012 and became law in February 2013. The new wine law dramatically reforms Moldova's wine rules and regulations by bringing them in line with those of the European Union and other international standards and best practices. For example, clear labeling rules and more efficient quality assessment procedures were adopted, and numerous costly and burdensome regulatory barriers such as a complex and costly licensing procedure were removed.

The new law also established the ONVV, which is led by a Coordination Council consisting of 13 members—ten representatives of professional wine associations plus three representatives from the Ministry. ONVV is also responsible for the promotion of Moldovan wine under the new national brand, *Wine of Moldova*, which was launched with USAID support in December 2013. The *Wine of Moldova* brand and corresponding promotion program represents a comprehensive marketing strategy, which includes quality control and assurance components and a visual identity—the logo and slogan—which reflect both the new and the older generations of the Moldovan wine industry. The *Wine of Moldova* program will be financed from the Fund for Vine and Wine, which has approximately $3.2 million from the approved Public Budget Law. The Moldovan wine industry plans to introduce the world to *Wine of Moldova* at the trade show *ProWein* in Germany in March 2014.

***Wine of Moldova implementation.*** With CEED II support, the WCB logo, slogan, and name have been submitted to AGEPI for registration to ensure intellectual property protection. Also, the domains and the social media pages for the 'Wine of Moldova' have been booked for the promotion activities of the ONVV. The intellectual property rights have been transferred to the ONVV in June 2014, but CEED II continued providing IP legal expertise to the ONVV for final national protection of the Wine of Moldova.

In February 2014, CEED II project consultant team has transmitted to the ONVV the set of the marketing policy documents, forming the foundation of the new Wine of Moldova program. These consist of the elements shown at figure 45.

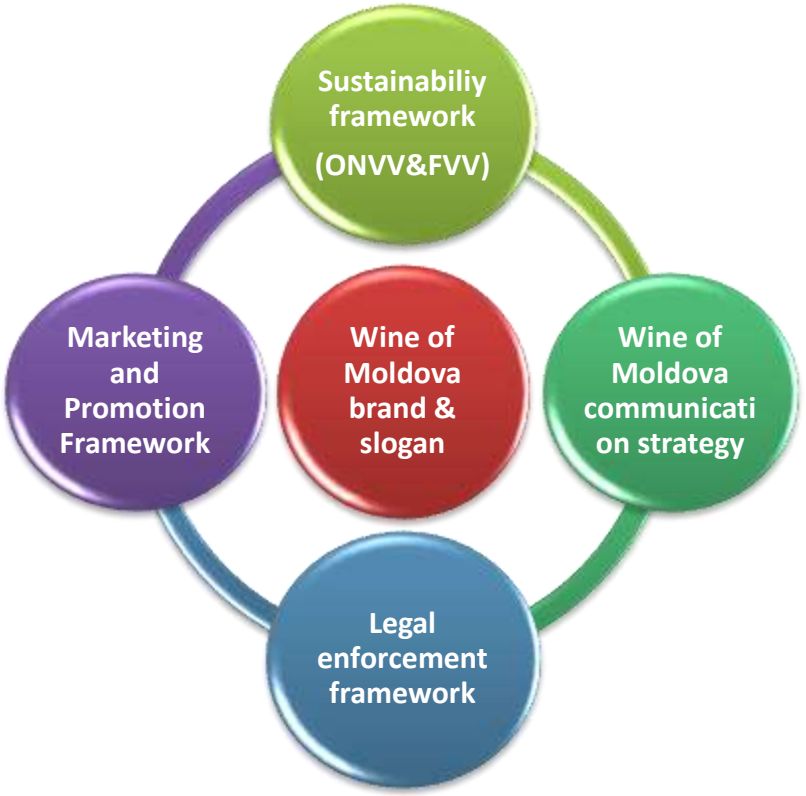



Figure 45. The Wine of Moldova Program developed by CEED II consultant team, and transmitted for implementation to the ONVV in 2014

CEED II consultant, Mr. Marco Tiggelman, assisted the ONVV to define the final draft of the Wine of Moldova communication and promotion strategy and to develop the marketing & promotion plan for the next 18 months of implementation. The WoM marketing plan is being developed accordingly to the best practices of other wine promotion institutions, such as WineAustralia, Wines of Argentina, Austrian Wines, etc.

Given that the ONVV hasn't been able to fulfill its obligations at its full capacity, CEED II undertook additional actions meant to complete the Wine of Moldova brandbook with additional design materials, meant to communicate Wine of Moldova within the promotion activities. Additionally, CEED II has managed and financed the development of the Wine of Moldova presentation web-site, www.wineofmoldova.com that was functional for the international launch of the Wine of Moldova, at the International Wine and Spirits Trade Fair ProWein 2014, in Dusseldorf, Germany. Facebook and Twitter pages have also been created and managed by CEED II consultants until ONVV undertook these activities in May 2014.

In addition, CEED II considered important to assist the ONVV to elaborate a content kit that could be used in Wine of Moldova POS materials, promotion activities, further website development and PR actions. For this purpose, a local short term editor specialist worked with ONVV on developing a content archive and copyrighting for Wine of Moldova program.

Consequently, the ONVV and the wine industry have been entitled with a complex program developed with CEED II project help, for a national generic promotion of Moldovan wines, containing all the key elements needed for a successful implementation. Additionally, CEED II project, assisted and supervised the correct launching and start-up of the promotion activities, keeping the focus on the quality of the products allowed into the program, the streamlined marketing plan, and the coherent communication, all aiming to preserve the brand values and strengthen its credibility.

**Problems Encountered & Solutions:** Due to the slow start-up of the ONVV, CEED II project had to cover a part of the activities on behalf of the ONVV, in order to ensure the successful international launch at ProWein Dusseldorf, and to follow the Wine of Moldova program agenda. The development of the communication toolkit for Wine of Moldova became the prerogative of the ONVV, which has took more time to assess the need and the briefs for the TV add, the photos, etc. Nevertheless, CEED II consultant and wine industry manager assisted ONVV staff and participated to their working process. ONVV decided to develop these additional communication instruments later in 2015.

### Activity 3. WCB promotion activities and increased awareness about Moldovan wines

**Accomplishments:** CEED II project intensified the organization of the promotion activities during the reporting period, given that the new Wine of Moldova country brand was launched, and that due to the Russian embargo from September 2013, the Moldovan wineries needed to find new sales opportunities for their products and to diversify markets.

The promotion activities that CEED II supported in the year 4 consisted of such type of actions:

- PR & communication & press activities (press trips, international publications, press conferences);
- International B2B activities (exhibitions & fairs, customized events in target markets, importers workshops, trade missions);
- B2C activities (wine tastings and study visits); and (iv) Wine of Moldova brand awareness activities.

CEED II project played an important role of coordination of all the activities around the common vision of the country brand “Wine of Moldova”; assisted the ONVV to smoothly take the leadership on the promotion events organization; attracted other donor institutions (i.e. CBI, UNDP, MIEPO) to support the promotion plan and facilitated the communication between private and public sector stakeholders. ONVV promotion fund for 2014-2015 is about 27 million MDL (USD$2 million), which will ensure a sustainable progress of the marketing activities.

All the promotion activities have been planned to synchronize with the ‘Wine of Moldova’ brand platform and the consequent marketing plan, which contributed to an effective launch of the new wine industry identity internationally and on the target export markets. One of the main purposes was to inspire the Moldovan wine exporters, but also their business partners and the wine importers and opinion formers from the target markets that the new ‘Wine of Moldova’ program and brand are a complex and sustainable initiative, embraced by the entire Moldovan industry and supported by a quality approach toward the products and the promotion activities.

CEED II project assisted the ONVV to better organize its marketing & promotion activities. CEED II international consultant, Marco Tiggelman worked together with the marketing team of the ONVV and developed an 18-month marketing and promotion activity plan, attached to the strategic objectives as defined by the wine industry.

The marketing plan was incorporated in the ONVV annual work plan and approved by the Council of Coordination and the Wine Industry General Assembly in June 2014.

Figure 46."Wine of Moldova" successful appearance at ProWein 2014, March 23 -25. Representatives from 13 most prominent wine companies with Caroline Gilby, Master of Wine

In this regard, the CEED II consultant, Marco Tiggelman further continued to assist the ONVV in the implementation of the program and to keep up with the standards of the Wine of Moldova. For each of the main export markets, individual plans have been developed, with milestones and target indicators. Following this complex approach, for some more complicated wine markets, such as USA and China, the ONVV was supported by USAID CEED II experts to develop "strategic penetration plans". As such, once the Moldovan wineries have been invited in a trade mission to USA by the US Secretary John Kerry, the ONVV has been assisted by CEED II consultant, Luis Capitao, to learn about the US market specifics and to develop a "Strategic vision to US wine market penetration". As a result of the trainings and workshops moderated by Mr. Capitao, the wineries have been better prepared for the trade activities and thus could have professional presentation in the USA.

**Text Box 4. Testimonials from a wine producer about the participation at ProWein**

*"Achieving good results in wine export and diversification of the markets is a difficult and long journey. The results are not immediate, and require a strong commitment, coherence and quality. Thus, it is needed to constantly participate to exhibitions, trade fairs and wine events, to become visible, reliable and recognizable. Only after several attempts, a wine importer may decide to sit down and talk business with you. For example, one Slovakian importer have noticed us at ProWein once in 2010, and then revisited us in 2011, and in 2012, we succeeded to ship our first delivery. We doubled exports in the next 2013 year up to$ 500 thds and plan another 50 % increase in 2014.The support of CEED II project in becoming more visible to ProWein exhibition was very important for this success."*

*Valentin Codreanu, executive director of Migdal-P*

Table 4. Wine industry promotion activities

| **Phase 1. TRANSITIONAL PHASE TO WINE OF MOLDOVA** | |
|---|---|
| **PR, communication & press activities** | |
| **Wine Press Trip to the National Wine Day 2013** | **October 4-7, 2013** |
| A delegation of 9 foreign wine journalists from: Poland (Czas vina journal), Czech Republic (Sommelier magazine), Germany (Sellection revue), the United Kingdom (Drinks International magazine), and Ukraine (Wings TV), visited a number of Moldovan wineries and attended the National Wine Day 13th edition.<br>On October 2013, Wings TV, a Ukrainian travel channel, broadcast a series of 5 episodes about the wines of Moldova. | - **Sommelier journal** no.5/2013 (Czech Republic) – 10 pages article on Moldovan wines<br>- **Revue pro Hotel&Restaurants** (Czech Republic) – 10 pages article on Moldovan gastronomy and tourism<br>- **Czas Wina** (Poland), no.3/2013 – one page article<br>- **Drinks International** – on-line publication http://www.drinksint.com/news/fullstory.php/aid/4237/Moldovan_wine:_All_Shook_Up.html<br>- **Wings TV (Ukraine) – 10 video broadcasted, available alo on-line at :** http://wings-tv.kiev.ua/index.php?option=com_content&task=view&id=1240&Itemid=45 |
| | - |
| **Annual General Assembly of Association of Sommelier of Europe** | **October 21-24, 2013** |
| Moldovan wines have been showcased to 32 European sommeliers from 6 countries, working in the most important European restaurants and for wine importing agencies. The ASE visited wine producers and touristic attractions of Moldova, and shared later their experience in European specialized journals and with peer-sommelier. | - 13 Moldovan wineries introduced to European Sommelier<br>- Two new contracts engaged for wine exports to Switzerland and Scandinavian contries (Fautor and Purcari wines)<br>- Incresed awarness about the quality of Moldovan wines on European markets, and also locally. |
| **Trade activities** | |
| **Tallin Food Fair (B2B, Estonia)** | **October 30 – November 1, 2013** |
| 4 Moldovan wineries, Cricova, Gitana winery, Et Cetera, Cainari winery participated for the second year in the fair, aiming to develop the Estonian market for high quality wines. The exporters targeted HORECA segment with niche wine products. | - A vinoteque and a restaurant with Moldovan food were opened in Talinn.<br>- Et Cetera and Cricova winery signed contracts for exporting new SKUs to Estonia and representation on Baltic countries. |
| **Wines of Moldova Gala at 'Casa Poporului' (B2C, Bucharest, Romania)** | **On November 18-21, 2013** |
| 12 Moldovan wineries organized a 4 days event in the "Casa Poporului" (People's House – the Parliament building) in Bucharest, Romania, invited by the Romanian Parliament in response to the Russian embargo. Due to CEED II support, the Moldovan wineries benefited of great interest from the press, tourists, and Romanian officials. | - Improved image and brand awareness.<br>- Increased media coverage and PR (more than 50 press clippings in written press and Romanian TV). |

| **'Good Wine' International Wine Fair (B2B, Bucharest, Romania)** | **November 22-24, 2013** |
|---|---|
| For the third time, Moldova has featured quality wines from 8 wineries (Fautor, Salcuta, Bostavan& Purcari wineries, DK-Intertrade, Chateau Vartely, Gitana winery, Basavin&Co) at Good wine fair, positioned as a premium wine exhibition, targeting the HORECA and wine shop segment of Romania. The event is also considered as an important trendsetter of Romanian market. With CEED II assistance, more wineries have been accommodated under a common country booth, and thus, ensured a good PR coverage. | - Gitana winery concluded a contract with a Romanian importer and initiated market penetration<br>- Fautor increased its wine sales in Romania by 2.5 times in 2013<br>- Chateau Vartely increased sales of premium wines throughout two new importers, with a total value of new exports of $70,000. |
| **Ukraine promotion campaign (B2B, B2C)** | **November 2013 – June 2014** |
| As the demand and interest for Moldovan wines was rising during 2012-2013, CEED II continued supporting Moldovan exporters to enhance trade on Ukrainian market. The strategic marketing objective has been to increase image of Moldovan wines by entering HORECA segment and throughout PR activities. Consequently, the campaign was designed to include: 4 master classes for HORECA segment and wine importers; 1 week "Wine of Moldova" in 5 selected Ukrainian restaurants; 4 articles dedicated to Moldovan wine in local leading journals; management of the special Facebook of Moldovan wines in Ukraine.<br>Still, because of the Ukrainian crises and strikes, the campaign couldn't harvest the planned results. | - About 80 sommelier and wine experts were introduced to Moldovan high quality wines and Moldovan terroir<br>- About 30 Ukrainian restaurant owners or managers have been presented to Moldovan wine offer<br>- More than 300 wine connoisseurs have participated at the wine tastings<br>- More than 25 press clippings and many social media comments have been recorded<br>- Wines from 7 Moldovan wineries have been tasted in 5 most selected restaurants of Kiev for two weeks<br>- Fautor wines have been included in the wine menu of one of the most reputed restaurant, "Old Royale" of Kiev. |
| **Phase 2. WINE OF MOLDOVA INTERNATIONAL LAUNCH** | |
| **International launch at ProWein Dusseldorf (Germany): press conference, national booth, master classes and communication campaign.** | **March 23-25, 2014** |
| With CEED II support, ONVV has internationally launched the Wine of Moldova country brand program at the most important European professional wine exhibition, ProWein. The participation concept, the activities at the fair, the designs of the booth and POSM materials, the used messages and the presented wines have been carefully developed and selected to the in line with the Marketing & Promotion Framework and Wine of Moldova brand positioning.<br><br>A complex set of activities have been implemented, aiming to increase international awareness about the new wine country brand of Moldova including : an international press conference; 7 professional master classes with Wine of Moldova presented by an renown Master of Wine; a targeted PR and advertisement campaign prior and post exhibition.<br><br>The Wine of Moldova stand has been the first big appearance of the wine country brand at an international wine event, represented by 13 most reputed Moldovan wineries. A special brochure, containing generic information about the Wine of Moldova, its wine regions and individual | - 30 international wine journalists, among which editors of important wine journals from Germany, Poland, Ukraine and Austria, attended the press conference<br>- More than 200 wine professionals participated to the 7 master classes and tasted the selected 25 Moldovan wines;<br>- Internationally renowned Master of Wine, Mrs Caroline Gilby, editor of Decanter magazine, and wine expert in United Kingdom moderated the press conference and master classes.<br>- 13 Moldovan wineries got an average of 12 business meetings and around 60 new contacts that are potential for new business relations.<br>- Five new contracts are being negotiated and close to |

| | |
|---|---|
| description and wines of each winery, has been developed specially for the ProWein edition. Alongside with the branded folder with press information and branded eco-bags, Wine of Moldova branding materials have made the presence of Moldova even more attractive. The national stand has had much more attendance, compared with the previous years. Each winery has had an average of 12 business meetings and around 60 new contacts within ProWein. At least five new contracts are planned to be concluded soon for new deliveries of wines from Moldova. | be signed for new wine exports to : Slovakia, Poland and United Kingdom, in result of ProWein 2014 |
| **Wine of Moldova launch in Czech Republic (B2B, Prague)** | **April 23-25, 2014** |
| Following the international launch on the European professional wine platform of ProWein fair, CEED II project supported ONVV in announcing the program on the main target markets on the EU.<br><br>In Czech Republic, the 2nd destination to EU markets, two workshops about Wine of Moldova with the wine sommelier, journalists, importers and distributors were moderated by the CEED II international consultant, Marco Tiggelman.<br><br>At CEED II initiative, the participation of the 15 Moldovan wineries at the Wine & Delicacies exhibition has been organized under the Wine of Moldova umbrella becoming more visible and memorable. The President of Republic of Moldova, Mr. Nicolae Timofti, visited the country booth, which attracted even more attention of the press to the new Moldovan wine identity.<br><br>UNDP Moldova co-funded these activities. | - Wine of Moldova launched in Czech Republic<br>- About 30 journalists, and 20 importers and distributors participated at the Wine of Moldova workshops<br>- 15 wineries showcased their wines to Czech importers at the Wine & Delicacies fair. |
| **Wine of Moldova launched in Romania (IWCB, Bucharest)** | **May 2014** |
| At CEED II initiative, the public announcement of Wine of Moldova on Romanian market was planned differently, throughout an outstanding victory of Wines of Moldova at the Bucharest International Wine Contest (BIWC). 110 Moldovan wine samples were registered in the competition, out of which 37 wines have been awarded with gold, silver and bronze medals, under the supervision of the International Organization of Vine and Wine (OIV). | - Wine of Moldova launched in Romania<br>- 37 Moldovan wines awarded with medals at a IWCB contest under OIV supervision |
| **Wine of Moldova launch in Poland (B2B, Warsaw)** | **June 05, 2014** |
| Wine of Moldova program was presented to Polish wine importers and distributors, within a half-day workshop in Warsaw, Poland, sponsored by CEED II, and assisted by the international consultant Marco Tiggelman. About 25 wine importers and several distributors of Moldovan wines participated to the event, expressing their readiness to become partners in the implementation of the marketing campaigns on the Polish market and to re-position Moldovan A specialized Polish wine revue, “Magazyn Wino” ensured the pre- and post-event PR of the Wine of Moldova proposal for the Polish market. | - Wine of Moldova launched on Polish market<br>- About 25 wine professionals endorsed the Wine of Moldova strategy for Poland<br>- Wine of Moldova presented in the specialized wine press. |

| | |
|---|---|
| **Wine of Moldova featured in Meininger Wine International Business no.6/2014** | **June 2014** |
| CEED II sponsored a study visit of the editor in chief of the Meininger Wine International Business, Mrs. Felicity Carter, in Moldova. Following it, an extensive editorial about Wine of Moldova has been published in the June edition of the Meininger's Wine International Business magazine (no.6/2014). This is an internationally known and spread wine journal, which audience is the wine business people, with a high rank reputation.<br><br>The article had a very positive reverberance internationally, but also in the domestic media, which appreciated the success of the ONVV and its new national brand. | - Wine of Moldova featured in a renown professional international wine journal |
| **Wine of Moldova trade mission to USA (Washington DC, New York)** | **July 27- August 4th, 2014** |
| 11 Moldovan wineries, the ONVV representatives and the Minister of Agriculture and Food Industry, Mr.Bumacov, have participated to a trade mission to the United States of America, at the invitation of US Secretary John Kerry. The trade mission has been funded by SABBIT program, and the ONVV. CEED II project was a strategic partner of this activity providing the expertise about the US wine market penetration, by Mr. Luis Capitao.<br><br>Following the recommendations from CEED II consultant, ONVV implemented the trade mission concept, and efficiently organized 2 presentation master classes in Washington DC and in New York, presented by Christy Canterbury, MW. Additionally, one extensive B2B event has been held in New York, and another wine tasting at the Moldovan Embassy premises. About 300 participants have attended Wine of Moldova events, among which wine importers, distributors, sommeliers, and wine journalists.<br><br>The media coverage was sufficiently extensive, including on-line publication of a reach of about 6 mio accesses, but also some written journals. Some important media and on-line portals have written about these events, raising awareness about Wine of Moldova in the USA, including in the post-event phase (i.e. Fox News "Wine Me" broadcast http://video.foxnews.com/v/3872880595001/the-unexplored-wine-region-of-moldova/#sp=show-clips ) | - Wine of Moldova introduced to US wine market<br>- 11 wineries showcased their best wines to US wine professionals<br>- In result of the trade mission one new importer started to do business with Moldovan wines from 5 wineries and plans to import at least 3 containers next year;<br>- Chateau Vartely has a new order for 5000 of premium wines for USA, and is currently negotiating with two more importers;<br>- Asconi winery has contracted the delivery of 5 more containers to his US importer, due to the increased orders he received after the trade mission.<br>- PR campaign instrumented in USA by Wine of Moldova and increased interest for Moldovan wines<br>- A Memorandum of Understanding has been signed between the ONVV and the TTB, that will ease the imports of Moldovan wines in the USA. |

DOSSIER

# Wine of Moldova – A Legend Alive

Moldova, one of the world's oldest wine-producing regions, has recently undergone a series of startling transformations, from new investments to the founding of a national wine body. Located at the crossroads of Europe, the Republic of Moldova is a producer of fresh, novel wines.

Figure 20. Wine of Moldova success at IWCB got viral in the on-line

## Winecompass.blogspot.com

August 6th, 2014
Circulation: 1,040 monthly online

WineCompass

**Wednesday, August 6, 2014**

### Getting to Know Moldovan Wine - Eastern Europe's Best Kept Secret

Last week the Moldovan National Office for Vine and Wine conducted trade tastings in Washington D.C. and New York City entitled *Wine of Moldova Eastern Europe's Best Kept Secret*. This presented an opportunity to learn more about Moldovan Wine far from the sweet Moldovan reds that I had tasted long ago.

Moldova is located in far southeast of Europe, with Ukraine providing an eastern border, Romania a western, and the Black Sea basin to the south. The climate is moderately-continental (46-47° latitude) with the Black Sea influencing vineyards in the southern regions. Red wine grapes are primarily grown in these southern regions, with white wine grapes predominately in the central regions. And there are four primary wine regions: Valul lui Traian (southwest), Stefan Voda (southeast), Codru (central), and Balti (northcentral). One interesting note is that Valul lui Traian translates to Trajan's Wall and is located between two of these walls used to protect the Roman Empire from "barbarians".

Figure 47. Moldovan wine in international press (up left - One page of the editorial on Wine of Moldova in Meininger's Wine International Business magazine no.6/2014; up rigth - Wine of Moldova success at IWCB got viral in the on-line media; down- One of the articles about Wine of Moldova on an American wine blog

**Problems Encountered & Solutions:** The new Wine of Moldova program became quickly the most trustworthy initiative that could respond to the difficulties caused to Moldovan wineries by the Russian embargo. Consequently, the expectations from the private sector for the new promotion program implemented by the ONVV have had to be managed, as the Wine of Moldova is a generic

promotion brand, and not an external sales department for the wine exporters. The Government authorities also became very demanding and pushed the ONVV to find new business partners for Moldovan wineries.

**Text Box 6. Testimonials of a wine producer on CEED II assistance impact on sales**

*"Even if the 2014 year was difficult because of the Russian embargo, our efforts to improve wine quality and the promotion activities organized in the last 2 years, most with support from CEED II project began bringing business results. In the first 8 months of the 2014 our sales increased by some 20% in value, even if the volumes decreased. We are proud to announce that in 2014 we had some important achievements: we have entered in the largest Polish distributor, "Bedronka", with about 3000 stores, and sold about 120,000 bottles of quality wine in 2014, and plan to grow with 30% in 2015. This was partly due to the events and campaign organized in Poland in 2012-2013 in partnership with CEED.*

*Also, an English wine importer that we earned at ProWein 2013, at the master class organized with support of the project has signed a contract in late 2013 and we delivered in 2014 a first palette of premium wines.*

*In addition, we have developed significantly the Romanian market and doubled our sales. We sell wine to new importers from Kenya, Austria, Finland, Canada, and all this- because we work with perseverance and we benefit of a more streamlined country promotion activities. CEED II project activities have directly impacted on this qualitative growth. We shall keep going towards quality and West!"*

*Ludmila Gogu,*
*General Director of Chateau Vartely*

Also, there was necessary to follow the quality standards of the WoM program both, by the wineries and their products, but also by the ONVV in the implementation of the marketing activities. Consequently, CEED II intervened with additional support from the international experts, Marco Tiggelman and Luis Capitao, in order to keep up with the quality of the promotion events. Considering the pressure that it had been under, the ONVV has demanded more support from CEED II project for promotional activities than it was initially planned for Year 4. The project responded to these requests and was involved actively in the planning, conceptualization, implementation and PR, becoming thus, the strategic partner of the OVNV and the Wine of Moldova program.

Figure 48.

## Activity 4. Promoting wine culture on the local market

**Accomplishments:** In the reporting period, the CEED II support to the promotion of the wine culture on the local market became grater, and more strategic. As such, the CEED II assistance was organized around the following key objectives:

(i) Promoting wine culture throughout popular and mass market events – a new concept and a higher standard of implementation of the National Wine Day (Wine Festival);
(ii) Building the wine culture trend for middle class society – throughout the bi-annual Wine Vernissage and PR& communication campaigns;
(iii) Popularization of the wine culture - throughout Wine School trainings for young generation (age 23-33 ); and
(iv) Improved quality of the wine service in HORECA - by promoting the sommelier profession.

<u>New concept for the National Wine Day (October 2013):</u>
CEED II responded to the private sector initiatives and requests to modernize and to re-think the organization of the National Wine Day, the central wine event of the country. In partnership with the Association of Wine Producers and Exporters (APEVM), CEED II has developed and promoted a new concept of the Wine Festival, which was finally agreed by some reluctant administrative authorities. Finally, APEVM and USAID CEED II project became the main organizers of the 12th edition of the National Wine Day, on the October 5-6, 2013, in the National Assembly square of Moldova's capital, Chisinau (during the previous 4 editions the event was held at MoldExpo, on a small and with low-access territory).

Figure 50. The logo of the National Wine Day 2013

The innovations of the 12th Wine Festival were many, including:

- the representation of the PGI wine regions and their specificity- the participating wineries have been displayed accordingly to their origin and each PGI association had its own booth;
- the Wine School – about 600 persons have followed the 20 master classes guided by professional wine experts ;
- the "Rediscover Moldova.Wine Road" - 10 renown young bloggers visited 15 wineries and learned to taste and appreciate the wine, posting about their experience on blogs and social media;

- the Wine Road at the Wine Festival – 21 visits to 6 Moldovan wineries have been organized directly from the National Square. About 450 foreign and local tourists benefited from special wine tour prices.
- A common branding and a more efficient PR&communication campaign – a specific branding was developed for the Wine Festival, used in all advertisement and communication materials. The PR campaign was very active on all traditional media channels, but also on-line and social media.

The 2013 Wine Festival edition was a big success and a quality change, being considered as the best Wine Day of the last 5 years. The President of the Republic of Moldova, the President of Estonia, the Prime-Minister of the Republic of Moldova, the executive director of OIV, and other high level guests participated to national Wine Day events. Within two days of the event about 100 thousands Moldovan and foreigners guests visited the fest. The wineries sold 4 times more wine than during previous editions. CEED II project plans to continue its support to the Wine Festival for its next edition, in 2014.

"Wine culture in Moldova" local PR campaign (November –December 2013). In order to respond to the Russian embargo accusation to Moldovan wines' quality, CEED II supported the implementation of a PR campaign "Wine culture in Moldova". Within this campaign, Moldovan wines have been showcased within attractive events of Moldovan society, benefiting from media coverage and interest from consumers. The campaign consisted of 15 wine events, to which participated around 1,500 persons including many journalists and opinion formers. The campaign served as a teaser for the launch of the "Wine of Moldova. A legend alive" brand, and supported the national launch with a Facebook contest and with wine master classes. Later, in September 2014, CEED II organized for the second time the "Rediscover Wine of Moldova. #alegendalive" tour for 12 young bloggers and journalists, with a high followers' number. This tour preceded the 13th edition of the National Wine Day (2014) and animated the on-line communication about wine culture. The actions has been very popular in the on-line media, but also in the local press, the bloggers being invited to several TV shows and radio broadcasts.

Winter and Spring editions of the "Wine Vernissage" (December 2013, May 2014).The bi-annual

Figure 51. The 5th edition of the Wine Vernissage organized at the Republic Palace on December 18, 2013

organization of Wine Vernissage became a consecrated tradition that promotes the wine culture to local consumers. The winter edition was organized on December18, 2013 at the Republic Palace and the spring edition at the Leograng Convention Center, on May 15, 2014.

Traditionally, there was a big interest for these events, the tickets being sold out in only 5 days. Each edition has been visited by around 500 wine amateurs, but also by local media, politicians and diplomats. Among them, the US Ambassador, Mr. William H.Moser, who was awarded the prize "Chevalier of the Vernissage" by the organizers, for the support that US funded project gave to Wine Vernissage.

The event has become sustainable, being sourced from ticket sale and contributions from the wineries. CEED II financial support was insignificant, but the project provided consistent assistance for a good organization of the event. The spring edition of the Vernissage was undertaken by the ONVV, who was coached by the APEVM and CEED II in event management, and used the new Wine of Moldova logo.

Wine School trainings at ExpoVin Chisinau exhibition. Within Chisinau ExpoVin exhibition, on February 19-23, 2014 at Moldexpo, CEED II has organized the 3rd edition of the Wine School, powered this time by Wine of Moldova. The Wine School targeted young people aged between 22-35 years, and consisted of 11 master classes with Wine of Moldova. Around 200 young people have been initiated in the wine culture at the Wine School. A wine coverage on the social networks raised the interest for wine culture and increased Wine of Moldova awareness in Moldova.

Figure 52. Second edition of the Wine School, powered by Wine of Moldova

Promotion of the sommelier profession in Moldova. In order to raise the quality of the wine service in the HROECA segment, CEED II continued its activities aiming to promote the sommelier profession in Moldova. The visit of the Association of European Sommelier in Moldova in November 2014 was a good opportunity to promote the sommelier services on the domestic market, throughout the local press.

In December 2013, the first group of 13 sommeliers graduated the first course for sommeliers organized by the Technical University of Moldova (UTM). The course was accredited by the Ministry of Education, offering official sommelier diplomas to the participants, which was made possible due to the official registration of the sommelier profession in 2013 (with CEED II support). The graduated sommeliers celebrated their diplomas during the Wine Vernissage winter edition.

**Problems Encountered & Solutions:** CEED II has been very intensively solicited by the big number of the activities that needed assistance and management. Still, given the importance of the initiatives, and the high trust from the wine sector associations to CEED II project, we have agreed to adapt the project plans to the sector needs and expectations. The Wine School and Sommelier School NGOs are yet very week, so, their activities need more support to achieve the objectives of their statutes.

### Activity 5. Legal and regulatory support continued in the wine industry

**Accomplishments:** CEED II continued providing support to continue legal and regulatory reform of the wine industry during the year 4. If previously the direct counterpart on these types of activities was the Ministry of Agriculture and Food Industry (MAFI), since December 2013, the ONVV started to play a more active role in the public-private dialogue with the MAFI and wine sector associations. Consequently, CEED II has assisted ONVV and the Council for Coordination to embrace their role of advocacy of the private sector initiatives. In this regard, the ONVV has established relations with the administrative authorities, including the Prime Minister office, the Ministry of Finances, the Ministry of Economy, the Moldovan Accreditation Agency, the Agency of Consumers' Protection, etc.

Still, the implementation of the Activity 5 has been much delayed, as this Activity was contingent upon the ONVV being fully operational, which occurred only in June 2014. The ONVV team didn't had sufficient capacity to promote the needed regulatory reforms, and the initiatives were much belated because of the debates on the draft technical regulation on the "common organization of the wine market" (TR).

The TR draft, planned to be approved by Government decision provoked long and tense public-private discussions and negotiations, given the opposite visions of the MAFI and private sector (ONVV) positions over the system of controlling the production of wines with Protected Geographical Indication (PGI) and with Protected Denominations of Origin (PDO).

With support from the CEED II project, the ONVV has developed concrete norms for the modification of the draft TR, agreed by the general assemblies of the PGI wine associations, and has submitted these to MAFI. Unfortunately, the ministry staff continued to reject the private sector proposals and, consequently, delayed severely the adoption of the Government decision. By the end of Year 4, the draft TR was not yet agreed with the ONVV and approved by the Government.

Meanwhile, due to the Russian embargo, the wine industry has asked the project to develop a study on the impact of the ban on the financial situation of the wine sector and the wineries. Such assessment was prepared during July 2014 by CEED II local consultant, Mr.Andrei Crigan. On August 4$^{th}$, 2014, CEED II and the ONVV presented publically the "Study of the wine industry financial situation, in result of the Russian embargo of September 2013. Proposals and solutions". The study served as a source for the dialogue between the wine industry and the Government about the state measures and need actions to stabilize the status of the industry that happened during July-September 2014.

Additionally, CEED II has been involved in assessing the status of the professional wine education and initiated the development of an Excellence center in Viticulture and Winemaking by the National College of Viticulture&Winemaking of Chisinau. The concept paper and the action plan shall be completed in the year 5.

**Problems Encountered & Solutions:** Given the antagonist visions between ONVV and MAFI over the PGI/PDO system and the draft TR, the implementation of the activity 5 has been very difficult.

CEED II project supported the private sector involvement and advocated for a transparent and balanced public-private dialogue. Still, despite that some of the MAFI officials have supported the sector's model for the PGI system, due to political reasons it was not possible to intervene with authority decisions. In September 2014, the TR draft was rejected by the Regulatory Impact Assessment Commission (Guillotine Commission) because of the non-compliance with the norms related to the regulation of the private sector, supporting consequently the arguments brought by the ONVV.

Due to this situation, the implementation of the activities of the milestones 2-3 of the activity 5 hasn't been possible. Still, the project considered strategic to strive for the respect of the principles that supported from the beginning the wine legislative reform, rather than to keep up with the administrative agenda. The role of the ONVV and the private sector still is underestimated by some MAFI servants, who are opposing to the ONVV leadership. This is partly due to the innovative concept of the new institution, unusual for the public servants, but also to some personal attitudes of the Ministry staff. Even if the implementation of the activity 5 wasn't fully completed, these actions are still on the agenda of the ONVV, and of the wine sector associations. As well, CEED II is continuing its assistance in this regard for the next 6 months.

## F. Finance & Investment Activities

### Activity 1: Facilitate the acceleration of a "credit market" within target industries

**Accomplishments:** CEED II contributed to the launch of a series of B2B meetings for IT and non IT companies. On March 13, 2014 CEED II, jointly with ATIC, organized the second presentation on form a series of B2B meetings with the participation of the IT and non IT companies, dedicated at presenting the IT products and solutions for the development and improvement of business processes in the targeted sectors. This joint initiative aims to create a favorable environment for communication, matchmaking, initiation of new collaborations. The B2B presentation on Client Resource Management (CRM) Systems was attended by 14 managers of 13 companies from different industries. Two IT companies operating on Moldovan market, DAAC Systems Integrator and Microsoft, presented the key components of an CRP system, the implementation process and the necessary resources, the advantages of the CRM system within the company, how it can be used to enhance sales, improve customer care and loyalty, management decisions etc. As CEED II is smoothly closing up the assistance in the cross cutting activities related to finance, ATIC undertook the leadership in organization of such business events and will continue to organize product and services presentations, as well as networking events in order to facilitate the collaboration of ICT sector with other CEED II targeted sectors.

**Problems Encountered & Solutions:** CEED did not encounter any problems in organizing the planned seminars and activities, except the fact that initially CEED II planned to have two B2B events in Year 4, but it actually manage to organize only one event, jointly with ATIC. The delay in organizing these meetings was due to the fact that IT companies are more inclined to make individual presentations of their products and it took more time than expected to convince them about the advantages of B2B presentations and persuade them to participate at joint meetings with other IT sector players.

### Activity 2: Support access to finance through special channels

**Accomplishments:** *Assisting wineries to benefit from EIB loansfor wine restructuring*. During reported year, CEED II supported the development of an investment plan for Divib Media LTD winery. The intention is to plant 20 ha of technical vineyards (8 different types) in Criuleni area under the ECO label. The investment plan is also incorporating the vineyard plantation plan. The total volume of the investment project is 354,000 EUR. The winery is ready to come up with 204,000 EUR own contribution. The development of the investment plan was needed first of all to understand the volume of resources to be invested in the plantation. Secondly, the winery wanted to develop a proper

business plan to be able to approach a financial institution, to get a loan and to leverage the investment. Thirdly, to have a plantation plan that meets the requirement for ECO certification. The development of the investment plan was finished in September, thus the winery is ready to start the plantation in spring 2015. Meanwhile the company will approach financial institutions for the needed additional financial resources.

*Ongoing support to DCA partners.* In the reported period, CEED continued its communication with and provided advice to financial institutions implementing the DCA activities, Prime Capital, Comertbank and Rural Finance Corporation.

During December 2013 and January 2014, CEED II provided the annual monitoring of three USAID DCA partners: Prime Capital, Rural Finance Corporation and Comertbank. During the monitoring visits, the loan files were verified to be in accordance to the Loan guarantee agreements, namely: the documents that confirm the loan destination and the connection with targeted sectors and its value chain; the qualifying borrowers; the compliance with environmental local regulations, as well as the requirements stipulated in the DCA agreements related to environmental compliance and anti-terrorism checking; and the correct reflection of the loans in the Credit Monitoring System (CMS). During the monitoring, CEED II did not detect any problem or non-compliance with the agreements. The results of site monitoring and Partners' proposal on how to improve the utilization of the DCA were presented to USAID in a DCA Monitoring Report.

In June, USAID and CEED II representatives organized meetings with the management of 2 institutions, Comertbank and Rural Finance Corporation. The main purpose of the visits was to discuss the status of the DCA guarantee, ways to improve DCA utilization and/or to clarify the factors that hinder the DCA activity performance, since during October 2013-May 2014 was noticed a lower rate of DCA utilization by both institutions than in the past years.

A productive meeting was organized with Comertbank on June 5, 2014. At the meeting participated representatives from USAID, CEED II and Comertbank team being represented by Mr. Serghei Cartasov, President of Executive Board of Comertbank. USAID and CEED II discussed with the bank representatives the status of the DCA agreement and the challenges they faced in placing the loans under the DCA. Once again partners were explained thoroughly which are the sectors eligible for financing covered by the agreement and were encouraged to increase financing for MSMEs engaged in targeted sectors. Following this meeting, Comertbank team became more active in attracting clients and the communications flow (additional questions and explanations to different situations) highly intensified with CEED II representatives. As a result, in the last 4 months (June-September), Comerbank managed to significantly increase the Cumulative Utilization Percentage from 0.86% on October 1, 2013 (same in June 1, 2014) to 14.01% on September 30, 2014.

The meeting with RFC took place on June 4, 2014. USAID and CEED II representatives met with representatives from RFC lead by Marcel Tonu, the new appointed President. During the visit, the management of RFC has been asked to comment on the execution of the agreement, to mention the challenges faced, and to come up with proposals on improving the disbursement. Besides the discussions on the development of the DCA activity, the Corporation informed about the significant changes that occurred in in the partner's management. An internal conflictual situation that lasted for almost one year determined the shareholders to vote during RFC General Assembly from March 2014 a new Board of Directors and a new President, Marcel Tonu. Facing major liquidity problems, RFC managed to improve its situation in May when lending restarted but only to crediting savings and loan associations. Since RFC main activity is to ensure the access of small farmers and rural entrepreneurs to financial services and these activities are not subject to DCA. In this situation, the main challenge faced by RFC, other than current short-term liquidity problems, is the fact that the qualifying borrowers are limited to several targeted industries that are not specific to the RFC activity. During the discussion, it turned out that RFC new management didn't pay attention that tourism and all chain activities are covered by DCA activity, which could be a niche for placement of credits.

Thus, the current management informed that DCA activity could generate no results in the following months. During the meeting Marcel Tonu, has insured that the institution does not give up direct lending and will take all necessary steps to restart lending for other companies that are not crediting savings and loan associations. Later, RFC President decided to suspend for 1 year the DCA agreement and in September submitted a suspension request for USAID examination, which was approved in October 2014.

As for Prime Capital, in the reported period the Cumulative Utilization Percentage achieved 22%. CEED II maintained weekly collaboration by phone with institution representatives and had several meeting related to the new DCA activity for energy efficiency activities.
By September 30, 2014, 40 loans in total amount of $1,305,000 were placed under the USAID Guarantee compared to the period September 2011- September 2013, when 20 loans in total amount of $614,500 were placed.

Prime Capital placed in total 11 loans (total utilization of $287,170, which represents 24.48% utilization rate), all of them being directed to the IT industry for purchase of primary residence by Moldovan IT professionals. From these loans, 3 are new, being placed in the period October 2013-September 2014 (total utilization of $69,500).

Additionally, under new DCA in energy efficiency purpose, during July-September 2014, Prime Capital placed 11 loans (total utilization of $115,625, which represents 3.28% utilization rate), all of them being taken by individuals for residentuial improvements with energy efficiency impact.

Rural Finance Corporation placed 9 loans (total utilization amount of $313, 682, representing 14.94% utilization rate), all until June 2013, thus being justified the request for contract suspention.

Comertbank disbursed in total 9 loans (total utilization amount $588,523 representing 14.01% utilization rate) to companies from the textile, furniture and fashion accessories industries, having an impressive evolution compared to 3disbursed loans until June 2014 (total utilization amount $36,730 representing 0.87% utilization rate).

*DCA New partnership.* In April 2014, USAID/Moldova entered into a co-guarantee partnership with the Swedish International Development Cooperation Agency (Sida) supporting access to finance for implementation of energy efficiency activities. The proposed guarantee is a 15-year $3.5 million and each Agency will take on 25% of the risk. The objective of the assistance is to improve the operational efficiency of MSMEs in Moldova in order to strengthen their commercial viability and growth in an environmentally sustainable manner, thus contributing to job creation and increased living standards. The Project also aims to allow individuals to improve their energy efficiency, affecting cost savings, benefitting energy use in Moldova, and in turn, increasing living standards.

The new DCA project was signed with Prime Capital, which currently implements another DCA agreement offering loans to individuals for the IT sector. CEED II provided assistance in the organization of the Official Launch of the new DCA activity. The Official Launch was successfully organized on June 17. The event was moderate by Carmina Vicol, Prime Capital CEO, and had as speakers Ingrid Tersman, Swedish Ambassador, Tudor Copaci, Vice-Ministry of Economy, and Donald Karoll, US Embassy official. Around 50 people attended the event. The launching ceremony was also attended by representatives of government institutions, CEED II and other projects, as well as representatives of the business environment and Prime Capital main clients. To inform the entire public about this new opportunity, 6 articles were published and the information was broadcast on TV and radio.

In the following months, CEED continued its ongoing communication with and provided advice to Prime Capital. Following the launch of new DCA activity for energy efficiency activities organized in June, Prime Capital started the process of negotiations with its first client in July. CEED II assisted the partner to introduce for the new DCA activity a mandatory checklist for the loan officers, in the internal procedures, which assures that before being placed under the USAID Guarantee, the borrower is checked in the list of Specially designed Nationals and Blocked Persons, maintained by the US Treasury's Office of Foreign Assets Control (OFAC), as well as in the list of designation published by United Nations Security Council (UNSC) sanctions committee (resolution 1267). Additionally, the checklist included reference to the environmental compliance of the financed projects with the requirements stipulated in the Guarantee Agreement and the Moldovan legislation.

Figure 53. Official Launch of new DCA activity on June 17, 2014
Speakers at the event *(from left to right):* Donald Karoll, US Embassy's official, Ingrid Tersman, Swedish Ambassador, Carmina Vicol, Prime Capital CEO, Tudor Copaci, Vice-Ministry of Economy.

**Problems Encountered & Solutions:** CEED II was not able to refer businesses to the DCA partners because the financial institutions decided not to disclose the DCA guarantee. They believe that knowing about the guarantee the clients will become less conscious in paying off the debt. Therefore, CEED II worked more with loan officers and managers of the DCA Partners to stimulate usage of the USAID guarantee in the lending activity. Comertbank had the lowest rate of utilization, but after the meeting from June 2014 with USAID and CEED II representatives, managed to increase the utilization rate to 14%. In order to support this tendency, CEED II organized a weekly communication to be able timely to advice and to be aware of potential clients.

## SECTION III

# Results and Impact

## A. Quantitative Results

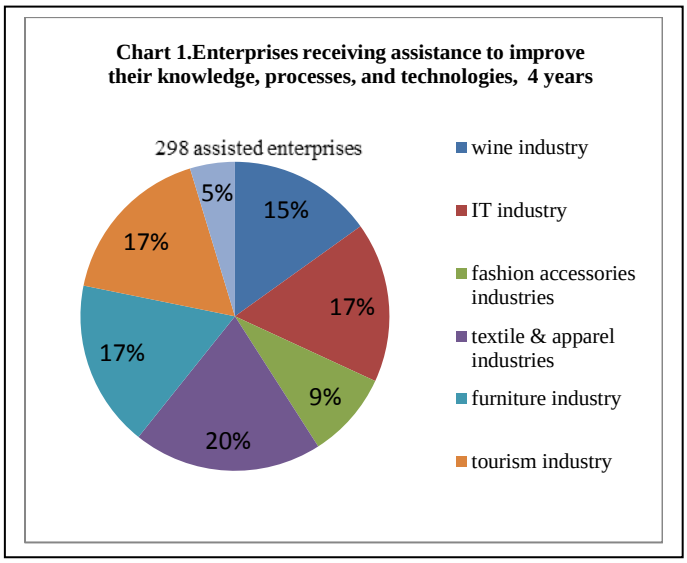
CEED II had an excellent performance during Year 4, driven by robust assistance programs for all target industries (fashion, IT, home furnishings, wine and tourism). The project met or exceeded the 4 years targets for 19 indicators, but missed targets for 2 indicators. See the table below. The project managed to catch up on several indicators where it had fallen behind after Years 1 -3.

**Table 5. CEED II Quantitative results for Year 3 and Life of Project**

| Indicators | Year 4 Target | Year 4 Actual | Cumulative Targets, Years 1-4 | Cumulative Actual, Years 1-4 | Difference cumulative Targets versus Actual |
|---|---|---|---|---|---|
| 01. Increased sales of assisted enterprises | 10.00% | 21.62% | 10.00% | 22.65% | 12.65% |
| 02. Increased investment in assisted enterprises | 15.00% | 23.24% | 15.00% | 32.66% | 17.66% |
| 03. Enterprises receiving project-related assistance to improve their knowledge, processes, and technologies | 15 | 55 | 220 | 298 | 78 |
| 04. Assisted enterprises applying improved knowledge, processes, and technologies | 25 | 50 | 160 | 228 | 68 |
| 05. Increased productivity of assisted enterprises | 6.00% | 15.22% | 4.25% | 17.46% | 13.21% |
| 06. Increased investments in workforce development initiatives by assisted enterprises or other cluster actors | 10.00% | 1.03% | 10.00% | 11.50% | 1.5% |
| 07. Participants in project-related trainings or capacity building programs | 1,650 | 3,546 | 5,000 | 12,281 | 7,312 |
| 08. Assisted enterprises paying more for BSP services with some or all of their own resources | 25.00% | 50.00% | 17.50% | 43.04% | 25.54% |
| 10. Assisted enterprises participating in project-related programs to enhance trade and investment capacity | 15 | 60 | 220 | 252 | 32 |
| 11. Assisted enterprises following recognized product or process standards | 20.00% | 43.96% | 20.00% | 43.96% | 24.96% |
| 12. Assisted enterprises expanding sales to new or existing markets | 25 | 46 | 160 | 148 | -12* |
| 13A. Number of participations of assisted enterprises exhibiting at trade shows or participating in business-to-business (B2B) events | 30 | 431 | 100 | 1109 | 1009 |
| 13B. Assisted enterprises exhibiting at trade shows or participating in business-to-business (B2B) events | | 23 | | 117 | |
| 14. Increased financing accessed by assisted enterprises | 10.00% | -22.34% | 10.00% | 1.96% | -8.04%* |
| 15. Assisted enterprises with increased financing or investment in targeted industries | 15 | 65 | 125 | 189 | 64 |
| 16. Associations or member-based organizations demonstrating increased leadership in targeted industries | 0 | 3 | 10 | 23 | 13 |
| 17. Increased revenues of associations or member-based organizations | 10.00% | 122.70% | 10.00% | 89.88% | 79.88% |
| 18. Member satisfaction level of associations or member-based organizations | 65.00% | 92.00% | 65.00% | 92.00% | 27.00% |
| 19. Participants at project-related trainings or workshops about advocacy or policy analysis | 50 | 262 | 300 | 911 | 611 |
| 20. Policy or position papers published or commissioned by assisted associations or member-based organizations | 10 | 13 | 35 | 41 | 6 |
| 21. Consultative meetings or events between representatives from the public and private sectors as a result of project assistance | 10 | 13 | 50 | 57 | 7 |
| 22. Government actions taken that improve the business environment in targeted industries | 5 | 9 | 30 | 37 | 7 |

** indicators where cumulative targets for Years 1-4 were not met*

*Impact on assisted enterprises.* CEED II's impact broadened significantly when measured by number of companies assisted: overall 298 companies, including 52 in home furnishings (furniture), 59 in apparel, 45 in wine, 50 in IT, 27 in fashion accessories, 51 in tourism and 14- other or cross-cutting activities (see chart 4). In year 4, the project assisted 55 new companies, exceeding the established target for year 4 by 40 companies and thus exceeding the 4-year target of 220 companies by 78 companies. This year, the expansion of assisted companies was due to the project's work in tourism, registering 43.6% from new attracted companies, and wine industry, with 21.8%. In addition, 76.5% (228 out of 298) of the assisted enterprises during 4 years indicated that they have applied the improved knowledge, processes and technologies gained from CEED II assistance, which demonstrates the effectiveness and high adoption by beneficiary companies of the delivered technical assistance.




As a result, during Year 4, the assisted enterprises registered a 21.62% increase in sales (indicator 1) against the target of 10%. This increase is calculated as arithmetical mean of the percent change in values of sales per each assisted enterprise. At the same time, in absolute terms, because of Russian embargo on Moldovan wines, the total sales of CEED II assisted companies in absolute terms decreased sales by $13 million (or 177 million MDL). While all other sector registered an increase of $20 million (or 279 million MDL), the wine industry registered a decrease in comparison to Year 3 of $33 million (or 456 million MDL) for the above mentioned reason.

In Year 4, the assisted enterprises registered a significant increase of investments (indicator 2) of 23.24% compared to the target of 15%. In absolute terms, it represents $16 million (or 229 million MDL).

If to consider the ration of project expenditure to sales change as a way to measure the impact of USAID assistance on enterprise sales, we can conclude that during the project of life, every 1 dollar spent on technical assistance contributed to sales growth of 4.52 in assisted enterprises.

**Table 6. Ration between expenditure in technical assistance to enterrise sales**

| Description | Sales | Expenditures | Annual ratio | Cumulative average ration |
|---|---|---|---|---|
| **Year 1 / FY2011** | $15,607,900 | $1,701,125 | $9.18 | $9.18 |
| **Year 2 / FY 2012** | $27,547,179 | $2,379,241 | $11.58 | $10.38 |
| **Year 3 / FY 2013** | $9,971,021 | $2,567,513 | $3.88 | $8.21 |
| **Year 4 / FY 2014** | ($13,073,072) | $1,991,011 | ($6.57) | $4.52 |

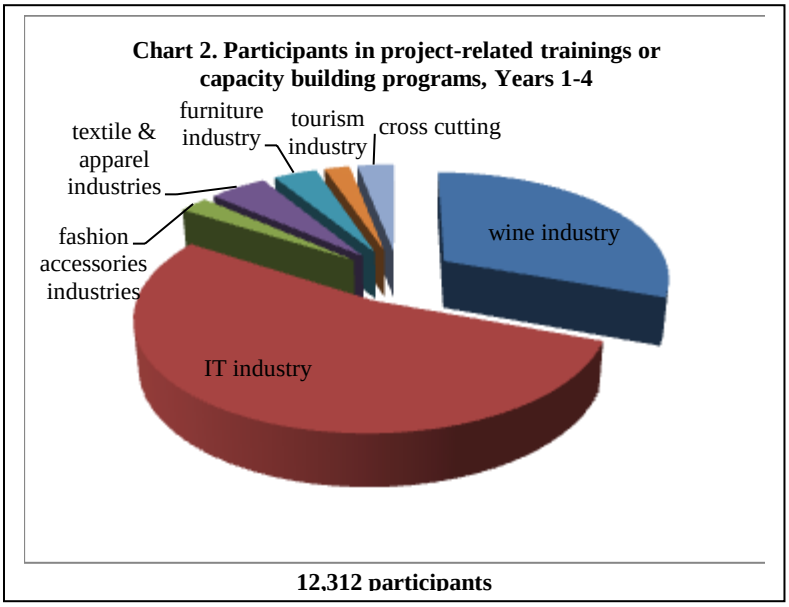
Note: applicable exchange rate: Year 3- 1$=12.3999M DL; Year 4-1$=13.5339 M DL

Further, during Year 4, 117 enterprises from the apparel, fashion accessories, home furnishings, tourism, IT and wine industries participated in at least 1 of more than 40 trade-related events. From 117 companies, 23 companies are new engaged in trade related events and 94 companies that participated repeatedly for several years with CEED II support. The assisted companies registered 431 participations to trade shows and B2B events during Year 4. Cumulative for 4 years, the number of unique enterprises participating at trade-related events is 117 (44-in Year 1,41 in Year 2, 9-in Year 3 and 23 in Year 4) and total number of participations is impressive – 1109 participation. Participation

at these events resulted in productive business contacts, often with trial or permanent orders following.

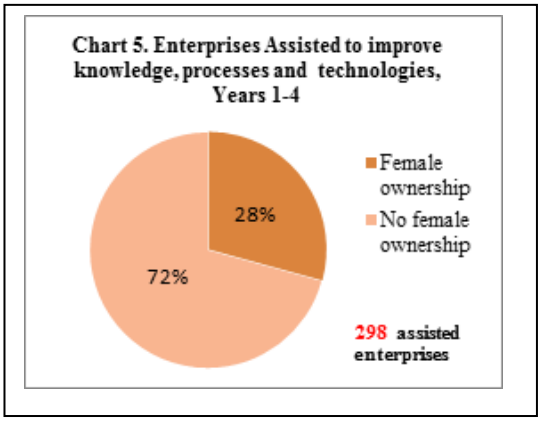
CEED II assistance contributed to sales, investment, and productivity growth in the assisted firms during Year 4. Overall, the assisted enterprises registered an average sales increase of 21.62%, particularly high for furniture (44.74%), the sector which CEED II exited in December 31, 2014. The furniture industry is followed by apparel (37.2%) and fashion accessories (23.06%), as well as tourism (18.35%), as emerging industry. The wine industry registered a decrease (-14.12%) as result of Russian embargo o Moldovan wines.The assisted companies registered an increase in the productivity, which measured as average sales per employee, recorded an average growth for Year 4 of 15.22%, since many firms reduced employment and increased sales, thus growing productivity.

The project also had remarkable outreach through its capacity building programs. During Years 1-4, more than 12,300 people participated in CEED II trainings and other capacity building events. In year 4 year, the achieved results are double than the established target (3,546 participations versus 1,650 predicted). The 4-year target of 5,000 participants has been exceeded by 7,312 participants. As shown in the pie chart on the right, the majority of participants (53%) come from IT activities, followed by wine sector activities (31%). These programs are instrumental to mentality shift and improved knowledge across industries.




*Impact on improved public-private dialogue.* With CEED II support, 23 associations demonstrate increased leadership. These results have met and exceeded the 4-year target, validating project's ability to consolidate the so important associative function within the target industries. In Year 4, the assisted associations produced 13 position papers, all of them in wine sector. The monitored associations increased their revenues by an average of 122% during Year 4, as well as member satisfaction levels, which reached 92%. CEED II support to improve public-private dialogue translated into 9 important government actions to improve business environment. In wine were taken 6 government actions, among them -Government Decision to allocate 450 th MDL to National Wine Day and MAFI order no 203 Regulation on the ONVV director competition progress and decision of the competition committee on ONVV director selection. Other 3 actions were taken in IT industry, mainly: decision to create IT Excellence Center and recognition order of IT Essentials training.

*Gender impact.* According to the monitored data disaggregated by gender, 84 out of 298 assisted firms are women-owned, which represents 28% of the beneficiaries. During Year 4, women-owned firms had an excellent performance as regards sales, investment, and productivity. Data shows that investments in female owned companies increased by 16%. It should be mentioned that 90% of female owned assisted enterprises (76 out of 84) apply improved knowledge, processes and technologies, which shows a high level



of absorption of CEED II assistance among female owned companies. CEED II also was gender sensitive and inclusive in its training and capacity building programs. Overall, 27.4% of 12,312 participants in various capacity building programs supported by the project were women.

*M&E challenges*. While results achieved during Year 4 were impressive there are still some challenges:

- IT enterprises do not report data for sales, investment, productivity and other enterprise related data because CEED II does not work with IT enterprises directly but rather supports industry-level activities within the IT industry. According to the project's PMP, CEED II only monitors *assisted enterprises*, or those that "receive customized firm-level assistance or participate with smaller groups of enterprises in intensive project sponsored initiatives related to productivity enhancement, trade and investment promotion, workforce development, etc." Most IT enterprises fall within CEED II's definition of *participant enterprises*, or those that are "participating in project-sponsored trainings, seminars, roundtables, and similar activities targeting a wide audience and/or members of CEED II-assisted associations or organizations."
- The reliability of some indicators is still questionable. Indicators # 06 and #08 that measure investments in workforce development and payments for BSP services may not be fully reliable because companies do not track these items separately and thus have difficulties in estimating them. Nevertheless, CEED II addressed to companies with the request to track these data, and in year 4 most of the monitored enterprises provided the needed information. Still, the unreliable data from the first 2 years impact the overview of these indicators.
- CEED II anticipates having difficulties in reaching the LOP target for indicator #12 "Assisted enterprises expanding sales to new or existing markets". CEED II monitors in details the impact of the assistance regarding expansion of sales from enterprises that agreed and signed MoUs with the project. But the number of enterprises with MoU (91) is much smaller than the LOP target (160). The other companies that are assisted by CEED II without a signed MoU provide information on company success in discussions during a meeting or a phone call. Since CEED II received a confirmation of sales increase, they have been included into database through a Follow-up memo, prepared by each Industry Manager. CEED II assumes that the real impact on sales expansion by assisted enterprises is much higher than the one reflected at indicator #12, but not all companies like to share this information since the problem of double accounting is still a practice and some companies are afraid to provide real data (with sales increase) that differ from the data submitted to fiscal authorities.
- The period for measuring member satisfaction by the associations does not correspond with CEED II fiscal year. Normally, the survey is done at the end of the calendar year, after all the planned activities are completed. Therefore, many members were questioned by phone, and not all have been reached, which makes the data for Indicator #18 perhaps not representative.

A complete report of CEED II's performance during Year 4 against the targets established in the project Performance Monitoring Plan is shown in the tables 7 and 8 below. Due to adjustments made as result of project extension, target modification and modification in indicators name, the disaggregated data will be submitted in the Quarterly Report for October-December 2014.

Table 7. CEED II Performance, Quantitative Indicators

| Final indicators | YEAR 1 | | | YEAR 2 | | | YEAR 3 | | | YEAR 4 | | | CUMULATIVE YEARS 1-4 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Target | Actual | Actual vs. Target | Target | Actual | Actual vs. Target | Target | Actual | Actual vs. Target | Target | Actual | Actual vs. Target | Target | Actual | Actual vs. Target |
| **01. Increased sales of assisted enterprises** | **10.00%** | **28.78%** | **18.78%** | **10.00%** | **19.12%** | **9.12%** | **10.00%** | **21.06%** | **11.06%** | **10.00%** | **21.62%** | **11.62%** | **10.00%** | **22.65%** | **12.65%** |
| Sales change, MDL | | 166,455,171 | | | 332,810,859 | | | 123,639,664 | | | -176,929,655 | | | | |
| Sales change, USD | | 15,607,900 | | | 27,547,179 | | | 9,971,021 | | | -13,073,072 | | | | |
| New sales, MDL | | 257,703,953 | | | 545,110,995 | | | 396,248,362 | | | 441,044,478 | | | | |
| New sales, USD | | 22,575,882 | | | 37,116,518 | | | 31,955,771 | | | 32,588,129 | | | | |
| **02. Increased investment in assisted enterprises** | **15.00%** | **70.42%** | **55.42%** | **15.00%** | **36.31%** | **21.31%** | **15.00%** | **0.66%** | **-14.34%** | **15.00%** | **23.24%** | **8.24%** | **15.00%** | **32.66%** | **17.66%** |
| MDL | | 173,543,027 | | | 238,444,800 | | | 6,342,954 | | | 229,264,147 | | | | |
| USD | | 15,216,615 | | | 19,675,769 | | | 511,533 | | | 16,939,991 | | | | |
| **Objective 1: Productivity of targeted industries increased.** | | | | | | | | | | | | | | | |
| **Expected Result 1.1: Use of improved technologies and business processes within target industries increased** | | | | | | | | | | | | | | | |
| **03. Enterprises receiving project-related assistance to improve their knowledge, processes, and technologies** | **50** | **73** | **23** | **85** | **129** | **44** | **70** | **41** | **-29** | **15** | **55** | **40** | **220** | **298** | **78** |

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **04. Assisted enterprises applying improved knowledge, processes, and technologies** | **35** | **19** | **-16** | **55** | **115** | **60** | **45** | **44** | **-1** | **25** | **50** | **25** | **160** | **228** | **68** |
| **05. Inctreased productivity of assisted enterprises** | **2.00%** | **27.56%** | **25.56%** | **3.00%** | **17.53%** | **14.53%** | **6.00%** | **9.52%** | **3.52%** | **6.00%** | **15.22%** | **9.22%** | **4.25%** | **17.46%** | **13.21%** |
| **Expected Result 1.2: Capacity of the workforce in targeted industries increased** | | | | | | | | | | | | | | | |
| **06. Increased investments in workforce development initiatives by assisted enterprises or other cluster actors** | **10.00%** | **13.16%** | **3.16%** | **10.00%** | **8.91%** | **-1.09%** | **10.00%** | **22.91%** | **12.91%** | **10.00%** | **1.03%** | **-8.97%** | **10.00%** | **11.50%** | **1.50%** |
| **07. Participants in project-related trainings or capacity building programs** | **700** | **1357** | **657** | **1000** | **3422** | **2422** | **1650** | **3987** | **2337** | **1650** | **3546** | **1896** | **5000** | **12312** | **7312** |
| **Expected Result 1.3: Capacity of industry service providers and other value chain actors increased** | | | | | | | | | | | | | | | |
| **08. Assisted enterprises paying more for BSP services with some or all of their own resources** | **10.00%** | **30.43%** | **20.43%** | **15.00%** | **47.27%** | **32.27%** | **20.00%** | **44.44%** | **24.44%** | **25.00%** | **50.00%** | **25.00%** | **17.50%** | **43.04%** | **25.54%** |
| **Objective 2: Trade and investment in targeted industries increased** | | | | | | | | | | | | | | | |

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Expected Result 2.1: Quality of products and services produced by enterprises in targeted industries improved** | | | | | | | | | | | | | | | |
| **10. Assisted enterprises participating in project-related programs to enhance trade and investment capacity** | **50** | **51** | **1** | **85** | **81** | **-4** | **70** | **60** | **-10** | **15** | **60** | **45** | **220** | **252** | **32** |
| **11. Assisted enterprises following recognized product or process standards** | **5.00%** | **0.00%** | **-5.00%** | **10.00%** | **6.45%** | **-3.55%** | **15.00%** | **47.62%** | **32.62%** | **20.00%** | **43.96%** | **23.96%** | **20.00%** | **43.96%** | **23.96%** |
| **Expected Result 2.2: Positioning and promotion of products and services from targeted industries in strategic markets improved** | | | | | | | | | | | | | | | |
| **12. Assisted enterprises expanding sales to new or existing markets** | **35** | **13** | **-22** | **55** | **50** | **-5** | **45** | **39** | **-6** | **25** | **46** | **21** | **160** | **148** | **-12** |
| **13. Number of participations of assisted enterprises exhibiting at trade shows or participating in business-to-business (B2B) events** | **20** | **96** | **76** | **25** | **216** | **191** | **30** | **366** | **336** | **25** | **431** | **406** | **100** | **1109** | **1009** |
| **Expected Result 2.3: Access to financing and investment by enterprises in targeted industries increased** | | | | | | | | | | | | | | | |
| **14. Increased financing accessed by assisted enterprises** | **10.00%** | **-6.36%** | **-16.36%** | **10.00%** | **35.34%** | **25.34%** | **10.00%** | **1.19%** | **-8.81%** | **10.00%** | **-22.34%** | **-32.34%** | **10.00%** | **1.96%** | **-8.04%** |

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **15. Assisted enterprises with increased financing or investment in targeted industries** | **25** | **22** | **-3** | **45** | **45** | **0** | **40** | **57** | **17** | **15** | **65** | **50** | **125** | **189** | **64** |
| **Objective 3: Public-private dialogue improved leading to a better business environment for targeted industries.** | | | | | | | | | | | | | | | |
| **Expected Result 3.1: Viability and number of industry associations and member based organizations increased** | | | | | | | | | | | | | | | |
| **16. Associations or member-based organizations demonstrating increased leadership in targeted industries** | **4** | **11** | **7** | **4** | **8** | **4** | **2** | **1** | **-1** | **0** | **3** | **3** | **10** | **23** | **13** |
| **17. Increased revenues of associations or member-based organizations** | **10.00%** | **126.81%** | **116.81%** | **10.00%** | **92.31%** | **82.31%** | **10.00%** | **17.68%** | **7.68%** | **10.00%** | **122.70%** | **112.70%** | **10.00%** | **89.88%** | **79.88%** |
| **18. Member satisfaction level of associations or member-based organizations** | **50.00%** | **81.74%** | **31.74%** | **55.00%** | **66.65%** | **11.65%** | **60.00%** | **81.67%** | **21.67%** | **65.00%** | **92.00%** | **27.00%** | **55.00%** | **80.52%** | **25.52%** |
| **Expected Result 3.2: Private sector capacity for advocacy and policy analysis increased** | | | | | | | | | | | | | | | |
| **19. Participants at project-related trainings or workshops about advocacy or policy analysis** | **50** | **292** | **242** | **100** | **199** | **99** | **100** | **158** | **58** | **50** | **262** | **212** | **300** | **911** | **611** |

| | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **20. Policy or position papers published or commissioned by assisted associations or member-based organizations** | **5** | **9** | **4** | **10** | **11** | **-2** | **10** | **10** | **0** | **10** | **11** | **1** | **35** | **41** | **6** |
| **Expected Result 3.3: Understanding by the public sector of private sector concerns and actions taken to improve conditions for targeted industries increased** | | | | | | | | | | | | | | | |
| **21. Consultative meetings or events between representatives from the public and private sectors as a result of project assistance** | **10** | **15** | **5** | **15** | **19** | **4** | **15** | **10** | **-5** | **10** | **13** | **3** | **50** | **57** | **7** |
| **22. Government actions taken that improve the business environment in targeted industries** | **5** | **8** | **3** | **10** | **10** | **-2** | **10** | **10** | **0** | **5** | **9** | **4** | **30** | **37** | **7** |

Note: The indicators 1 and 2 are calculated as a conversion of MDL amounts into USD at the average annual exchange rate of 1$= 12.3999 MDL forYear 3 and 1$= 13.5339 MDL for Year 4, to ignore the impact of exchange rates fluctuations

Table 8. CEED II Progress against targets, Year 4

| Performance Indicators | Comments & Explanatory Notes |
|---|---|
| **01. Sales of assisted enterprises** | **TARGET ACHEIVED.** Overall, the assisted enterprises registered an average increase of 21.62% in sales.<br>The highest growth was recorded by furniture companies (44.74%). This can be explained by the fact that in August 2013 with CEED support, the first common furniture center Mobimall was launched, and that attracted many clients. Additionally, the Made in Moldova promo campaign helped build awareness about quality furniture and the design and branding assistance helped compaies enhance their competitiveness generating new sales.<br>The companies from fashion industries also registered an important increase in sales 27.12%- for apparel and textile companies and 23.06% -for footwear and accessories companies. This is due to the fact that, as result of CEED II assistance, companies produced and exported more high value added manufacturing services: Olga Ceban increased exports by 73%, Infinitextil -by 32%, Steaua Reds –by 25%, Ju-Bijoux - by 24%, Ionel -by 12%, Zorile - by 14%, Tighina - by 9.5%, and Artima - by 5%, in comparison with previous year. Additionally, 3 new Din Inima stores opened in reported year contributed to sales increase on the local market. During year 4 the common stores contributed with15 mil. MDL to sales on the local market which constitutes about 6% of all sales on the local market.<br>The companies from tourism sector as emerging industry registered an increase of 18.35% of sales, mainly due to increased awareness of Moldova as tourism destination achieved through CEED II activities, as well as participation of local tour operators at international exhibitions and organization of familiarization tours.<br>The wine sector companies are the only ones registering a decrease in sales of -14.12%. Since a lot of reforms have been made in reported year in wine industry, the negative result is totally due to political decision of Russia to impose an embargo for Moldovan wines as result of Moldova decision to integrate into EU.<br>Analyzing the indicator from the enterprise size, micro and small enterprises recorded the highest growth in sales, 49.06% and 26.02% respectively, demonstrating their flexibility and quick reaction to market changes. Since most wine companies which were affected by Russian embargo are medium and large size, medium companies per total registered an increase in sales of 25.26%, while the large ones recorded a decrease of -4.13%. |
| **02. Investment in assisted enterprises** | **TARGET ACHEIVED.** The value of investments in assisted companies registered a good increase of 23.24 % in Year 4 compared to Year 3, exceeding the Year 4 target of 15%. This impressive growth is mainly due to fashion industry companies: textile and apparel recorded a growth of 161.08% while footwear and accessories companies - a growth of 54.56%. Enterprises from furniture and wine sectors also registered increased investment of 11.96% and 8.52%, respectively. Only investment in the tourism industry declined in Year 4 compared to Year 3 (-39.19%). |
| **1: Productivity of targeted industries increased.** | |
| **Expected Result 1.1: Use of improved technologies and business processes within target industries increased** | |
| **03. Enterprises receiving project-related assistance to improve their knowledge, processes, and technologies** | **TARGET ACHEIVED.** In year IV, CEED II assisted in total 162 companies, 55 companies being assisted for the first time in this year and 107 companies repeatedly. CEED II's impact broadened significantly when measured by total number of unique enterprises assisted in 4 years: 298 companies, including 59 in textile, 52 in furniture, 51 in tourism, 50 in IT, 45 in wine, 27 |

Table 8. CEED II Progress against targets, Year 4

| Performance Indicators | Comments & Explanatory Notes |
|---|---|
| | in fashion accessories industry and 14 in others. The project worked with 55 new assisted companies during Year IV, exceeding year IV target, and 4 year- life of project target (LOP) of 220 unique enterprises due to good results in Years 1, 2 and 4. Before CEED II contract extension for Year 5, the LOP was calculated for 4 years and the project focused to attract new companies for assistance mainly in Year I and Year II in order to start expanding the assistance earlier to a higher number of companies, thus obtaining a better impact on companies' development during Year III and Year IV. Since the project was extended, CEED II managed to attract 55 companies for assistance than the target of 15 companies. The emphasize was to attract more companies in wine being a strategic sector for the country (12 new companies) and in tourism sector where the assistance started from Year 2 (24 companies) |
| **04. Assisted enterprises applying improved knowledge, processes, and technologies** | **TARGET ACHEIVED.** Follow-up monitoring has shown that during Year 4, the number of enterprises which confirmed for the first-time that they apply improved knowledge, processes, and technologies is 50 and is double higher than the target of 25 for Year 4. This demonstrates the effectiveness and high adoption by beneficiary companies of the delivered assistance. If we look at the cumulative figures for 4 Years 228 out of 298 assisted enterprises (76.5%) are applying the accumulated knowledge. The biggest progress was made by the companies from tourim industry (24), followed by companies from textile (11) and IT (8).The LOP target established for 4 years (before CEED II extention for Year 5) is more than achieved - 228 companies versus the LOP of 160 companies (or 142.5% more). |
| **05. Productivity of assisted enterprises** | **TARGET ACHEIVED.** Measured as average sales per employee, productivity has increased by 15.22% compared with a target of 6%. All industries have recorded a positive average growth in productivity, except wine sector. Most companies have increased sales and there was an impact on increasing productivity due to decreased employment (-748 employees). The highest growth was recorded by textile companies (27.12%) followed immediately by furniture companies (25.35). Even if the number of employees in furniture and tourism companies increased (57employees), the productivity increased too, due to more efficient operations resulted in increased sales. At the same time, an impressive decrease in the number of employees was registered in wine (-450) and textile companies (-322), mainly in medium and large companies. |
| **Expected Result 1.2: Capacity of the workforce in targeted industries increased** | |
| **06. Investments in workforce development initiatives by assisted enterprises or other cluster actors** | **TARGET ACHEIVED.** The value of investments in workforce development initiatives increased by 1.03% in Year 4 compared to Year 3. The highest growth was recorded by the furniture industry (140.87%), followed by the fashion ac cessories industry (65.05%) and IT industry (30.14%). This shows an increased understanding of the importance of knowledge and higher level of skills. Even though the target for Year 4 was not achieved, the significant increase in Year 3 (22.91%) resulted in a moderate cumulative increase that exceeds the 4 years target by 1.5%. The experience of collecting this data from companies shows that they had difficulties in reporting them because they didn't track them in their records, this information being not requested by local accounting law. Upon repeated requests for data by CEED II, companies started to keep separate records of this indicator. CEED II managed to enlarge the number of companies monitored under this indicator from 19 in Year 1 to 94 in Year 4 to raise companies' attention to the accuracy and reliability of these data. |

Table 8. CEED II Progress against targets, Year 4

| Performance Indicators | Comments & Explanatory Notes |
|---|---|
| **07. Participants in project-related trainings or capacity building programs** | **TARGET ACHEIVED.** More than 12,200 people, women representing 27.5%, participated in project related training or capacity building programs, which exceeded by 245% the 4-year target fixed at 5,000 participants. This shows an impressive outreach achieved by CEED II during all 4 years. Only in year 4, CEED II involved 3546 people in project related trainings or capacity building programs. The majority of participants come from IT-related programs, specifically technical trainings, educational programs and industry–wide events such as Start-up Weekend , as well as from the wine sector programs. |
| **Expected Result 1.3: Capacity of industry service providers and other value chain actors increased** | |
| **08. Assisted enterprises paying for BSP services with some or all of their own resources** | **TARGET ACHEIVED.** According to data reported by assisted enterprises, 44 out from 88 (or 50%) assisted enterprises have increased the value of services contracted to BSPs in Year 4 of the project compared to Year 3. It is noticeable that in fashion and furniture industries, these investments are made by companies with dynamically developing own brands and were fueled by CEED II own brand development assistance program. |
| **Objective 2: Trade and investment in targeted industries increased** | |
| **Expected Result 2.1: Quality of products and services produced by enterprises in targeted industries improved** | |
| **10. Assisted enterprises participating in project-related programs to enhance trade and investment capacity** | **TARGET ACHEIVED.** CEED II assisted in Year 4, 168 companies to enhance their trade and investment capacity from which 60 companies are new (unique). From 60 unique companies, 24 are in tourism, 14- in wine, 12- in IT, 8 –in fashion industry and 2- in furniture. This was a significant effort, since the target was 15. Cumulative in 4 years, 252 unique companies enhanced trade and investment capacity and exceeded the target for 4 years of 220 companies. |
| **11. Assisted enterprises following recognized product or process standards** | **TARGET ACHEIVED.** Measured as the percentage of enterprises that introduced new recognized process standards, this indicator constituted almost 44% at the end of the Year 4 exceeding the target of 20%. This show that 40 out of the 91 monitored companies with MOUs introduced recognized products and improved process standards and production methodologies. It indicates that many companies adopted new standards and already follow international standards. |
| **Expected Result 2.2: Positioning and promotion of products and services from targeted industries in strategic markets improved** | |
| **12. Assisted enterprises expanding sales to new or existing markets** | **TARGET ACHEIVED.** In year 4, 46 unique companies have expanded sales to new or existing markets, achieving Year 4 target of 25 companies. The registered results for 19 fashion industry companies (textile, footwear and accessories) is due to the active promotional campaign "*Din Inima Branduri de Moldova"* that increased the recognition of Moldovan fashion brands and contributed to sales expansion and new outlets domestically, as well as participation at international exhibitions. For 17 IT companies, the annually participation at ICT Summits, as well as visits to Armenia, Sweden and other B2B events organized during CEED II activity, determined expansion of companies sales.<br>The achieved results in Year 4 are good, CEED II will work to catch up the 4 years target (160-LOP versus 148-achieved) during Year 5. The current indicator situation is due to the fact that CEED II is monitoring in details the impact of the assistance regarding expansion of sales mostly from enterprises with which the project has signed MoUs (91companies) being much smaller than the target for indicator 12(160). Nevertheless, CEED II makes efforts to interview and collect information through |

Table 8. CEED II Progress against targets, Year 4

| Performance Indicators | Comments & Explanatory Notes |
|---|---|
| | discussions from a larger number of assisted enterprises. CEED II assumes that the real impact on expansion of sales by assisted enterprises is much higher than the reported one. |
| **13. Assisted enterprises and number of participation at exhibiting at trade shows or participating in business-to-business (B2B) events** | **TARGET ACHEIVED.** It should be mentioned that 431 participations of 117 non-unique companies have been supported by CEED during Year 4. Wine companies had most intensive participation (264 participations), followed by the companies in apparel (87 participations) and fashion accessories (40 participations) industries. While companies cost-sharing participations in trade events demonstrates sustainability, these interventions were expanded beyond target due to tangible results, in the form of productive business contacts, as well as trial or even permanent follow-up orders.<br>With USAID support, 117 Moldovan firms participated at about 40 international and domestic trade fairs, as well as B2B and B2C events, that helped to build client base and grow markets. Among the key trade events are White Label, Zoom by Fatex and Textilegprom Exhibitions - for apparel firms, Leather and Shoes international fair in Kiev for footwear firms; ITB Berlin International trade show and CMT Stuttgart exhibition - for tourism firms, ProWein International Fair- for wine firms and CeBIT 2014- for IT firms.<br>Cumulatively for 4 years, 1109 participations to trade events from 340 non-unique companies show the exceeding of 4 years target (100). |
| **Expected Result 2.3: Access to financing and investment by enterprises in targeted industries increased** | |
| **14. Financing accessed by assisted enterprises** | **TARGET NOT ACHEIVED.** The value of financing accessed by the assisted enterprises from banks and other financial institutions decreased by 22.34% in Year 4 versus Year 3 resulting in the average increase for all 4 years of1.96% while the target for 4 years in 10% increase . This decrease is totally due to wine companies (-33.24%) fact attracted in Year 2 many resources (increasing the indicator by 41.43%), and respectively, in Years 3 and 4 they used the resources accessed in Year 2. All other industries registered a good increase: furniture industry – by 24.41%, tourism sector – by 14.10%, textile industry – by 14.08% and fashion accessories- by 11.93%. |
| **15. Assisted enterprises with increased financing or investment in targeted industries** | **TARGET ACHEIVED.** 65 out of 91 unique assisted and monitored enterprises, or 71.4%, increased financing or investment during Year 4 compared to Year 3. These are mainly medium and small size companies from the wine and apparel sectors. Overall, during 4 years, 189 companies (non-unique) accessed greater financing and investment in targeted industries, exceeding the 4 years target of 125 companies. |
| **Objective 3: Public-private dialogue improved leading to a better business environment for targeted industries** | |
| **Expected Result 3.1: Viability and number of industry associations and member based organizations increased** | |
| **16. Associations or member-based organizations demonstrating increased leadership in targeted industries** | **TARGET ACHEIVED.** With CEED II support, in year 4, 3 new associations demonstrated increased leadership. During 4 years of CEED II activity, 23 associations demonstrated increased leadership, twice exceeding the target for 4 years of 10 associations, demonstrating in this way project's ability to consolidate the associative function within the target industries. Initiated wine reforms have activated the 13 associations in the wine industry, some of which existed, while others were formed to support the reform. Likewise, the tourism workforce joined 6 associations. Finally, ATIC, APIUS and Association of Furniture Producers also continue to play an active role. |

Table 8. CEED II Progress against targets, Year 4

| Performance Indicators | Comments & Explanatory Notes |
|---|---|
| **17. Increased revenues of associations or member-based organizations** | **TARGET ACHEIVED.** The monitored associations that provided data have increased their revenues by 22.7% during Year 4 versus Year 3. AWPEM from wine sector registered a considerable growth of its revenues by 200%. APIUS registered a significant increase of 139% compared with a registered decrease of -5 % in Year 3. The new created inbound tourism association, ANTRIM, registered 100% increase while ATIC- an increase of 51.7%. |
| **18. Member satisfaction level of associations or member-based organizations** | **TARGET ACHIEVED.** Average member satisfaction level in Year 3 is higher than in the past year, registering 95% for wine associations, and 86% for APIUS. The best progress in terms of member satisfaction was registered by wine sector (from 81% in Year 3 to 95% in Year 4), demonstrating the positive impact of CEED II support. All the above mentioned results are good; however, CEED II is concerned about the representativeness of this data because normally associations survey the member satisfaction at the end of calendar year, as for ANTRIM and ATIC. For this report, data has been collected mostly by email, and not all the addressed members have responded to the survey. |
| **Expected Result 3.2: Private sector capacity for advocacy and policy analysis increased** | |
| **19. Participants at project-related trainings or workshops about advocacy or policy analysis** | **TARGET ACHEIVED.** During Year 4, 262 people, from wine and tourism sector, participated in project related events about advocacy or policy analysis, exceeding the target of 50people. Cumulative for 4 years, 911 people participated in CEED II trainings or workshops, exceeding 3 times the target for 4 years of 300 participants. These results are connected with the reforms in the sector. |
| **20. Policy or position papers published or commissioned by assisted associations or member-based organizations** | **TARGET ACHEIVED.** During Year 4, the assisted associations produced 11 position papers, all of them in wine sectors, demonstrating their active involvement in industry reform initiatives. Examples in the wine sector include: Wine sector General Assembly and Position paper supporting draft version of the "Technical Regulations for operating in wine sector"; Presentation of Strategic Vision of Wine of Moldova penetration and development on USA market; Wine Country Brand Program-National Launch; Amendments to the final draft of the Technical Regulation on Wine Sector organization - PGI/PDO system. |
| **Expected Result 3.3: Understanding by the public sector of private sector concerns and actions taken to improve conditions for targeted industries increased** | |
| **21. Consultative meetings or events between representatives from the public and private sectors as a result of project assistance** | **TARGET ACHEIVED.** During Year 4, 13 consultative meetings were held between government and private sectors representatives within the wine sector (11 meetings) and tourism industry (2 meetings), demonstrating both public and private sectors' commitment to dialogue. Cumulated for 4 years, 57 meetings in total have been held, from which 43 in the wine sector. Thus, the target for 4 years has been achieved, being exceeded by 7. |
| **22. Government actions taken that improve the business environment in targeted industries** | **TARGET ACHIEVED**. During Year 4, CEED II assistance resulted in 9 government actions to improve the business environment, against the Year 4 target of 5 actions. In wine were taken 6 government actions and 3 actions were taken in IT industry. Examples in IT sector: Decision to create IT Excellence Center; recognition order of IT Essentials training. Examples in wine industry: Government Decision to allocate 450 th MDL to National Wine Day; MAFI order no 203 Regulation on the ONVV director competition progress and decision of the competition committee on ONVVV director selection<br>Cumulated for 4 years, 37 government actions in total have been taken to improve the business environment. Thus the target for 4 years has been successfully achieved, being exceeded by 7. |

## B. Qualitative Results

Project performance, in its entirely, is difficult to measure. While performance against planned activities, as reported in Section II, and performance against planned targets, as reported above, are both important and required, neither paints a full picture. As such, bellow CEED II reports, in a more qualitative manner, its results from the previous year by target industry.

### B1. Fashion Industry

- Own brand companies grew in number and increased sales. With CEED and CEED II support, approximately 70 companies representing about 20% (4% more than last year) of the industry currently produce and sell under own brand. In terms of value, sales of own-branded products increased up to 271,850.000 MDL or by 43% in comparison with previous year. This is an extraordinary accomplishment, while many of the other companies from the industry experience a sales decline.
- Own brand companies invested more in promotion. Moldovan own label apparel companies changed their vision about the importance of promoting new brands and increasing their visibility. During Year 4, Ionel invested in promotion 220,000 MDL, Vasconi Textile - 28,000 MDL, Iuvas – 48,000 MDL and Tricon – 64,000 MDL. In addition, 25 Moldovan fashion brands participated in the Din Inima joint promotion campaign, and cost-shared around 650,000 MDL for advertising and promotion.
- Companies improved the quality of products from point of view of design and quality of raw materials and hence sales. CEED II helped companies bring their designers' visions up to date in terms of the development of new collections and assisted them to select and purchase high quality fabrics from European Suppliers. Now the collections of Moldovan companies successfully compete with foreign brands on the local market, and contribute to the increase of companies' sales. They recorded an increase in sales in the spring/summer season of year 2014 in comparison with similar season of year 2013 as follows: Tricon by more than 2.3 times, Hincu – more than 2 times, Cojocari Grup (Vascini) by 48%, Emilita Lux by 50%, Vistline by more than 65%, Burlacu – by 7%, and Maicom by 1.7 times. Velitextil Plus launched its collection on the local market under the new brand Crème Brule and has a big success. The sales of Velitextil Plus during spring/summer season constituted 110,000 MDL or 6% of total company sales.
- Three new Din Inima stores contributed to sales increase on the local market. More than 30 Moldovan brands (apparel, footwear and fashion accessories manufacturers) exhibit their products in the common Din Inima stores. In year 4 the common stores contributed with15 mil. MDL to sales on the local market which constitutes about 6% of all sales on the local market.
- Moldovan manufacturers increased exports to Russia. With CEED II's support for apparel companies' participation in the at Textilegprom exhibition, export share of participating enterprises almost increased. Steaua Reds, Infitextil, Odema, and Olimpus export share to Russian market increased up to 12%.
- Firms exported more high value added manufacturing services. By supporting Moldovan apparel companies' participation at international exhibitions CEED II helped them provide services with higher value added than the C&M they provided before and to increase their exports. Ionel increased exports by 12%, Infinitextil -by 32%, Steaua Reds –by 25%, Olga Ceban by 73%, Zorile - by 14%, Tighina - by 9.5%, Ju-Bijoux - by 24% and Artima - by 5%, in comparison with previous year.
- Companies got new sales to European markets. With CEED II support, many Moldovan companies participated at Zoom by Fatex. Some of them received trial orders from potential clients, some others got bigger orders and long-term contracts, as follows:
    - Ionel established 7 contacts with buyers from France, Slovak Republic, Romania and others. For 1 new potential client from Slovak Republic the company produced the trail order and it is now in negotiation phase for a contract for 12,000 man suits for

spring 2015 season. The company signed a long-term contact with Formens and Benrom form Romania and HDM France. In Year 2014 the Ionel made orders for these clients in the amount of 1007,243 Euro.

- Steaua Reds established 3 new contacts. For the client CARVEN (France) the company produced 6 samples of man pullovers. Based on the quality of the stitched samples the company will negotiate the possible order.
- Odema established 3 contacts. With the clients from France and Sweden, the company signed a long term contract and in Year 2014 stitched clothes in the total amount of 21,812 Euro.
- Velitextil Plus established 5 new contacts. With the client from Sweden signed a contract for 900 children dresses in the amount of €18,000 per year.
- Olga Ceban attracted 2 new clients and agreed the cooperation program for the new season and signed and executed the contract with Birdie Rock client from The Nederland in the total amount of 9,762 Euro. With the Pretty Wild Lingerie client from The Nederland the company signed a long term period contract based on private label scheme of collaboration and executed and delivered items in the total amount of 18,256 Euro.

- APIUS restructured. CEED II successfully engaged APIUS to put in place serious institutional reforms strengthening the organization. The project assisted APIUS to develop strategic and operational plans, examine their governance and organizational structure, define members' benefits, and develop internal regulations and procedures. These important structural changes were approved at the General Assembly in fall 2013. Moreover, APIUS was engaged in meaningful activities, such as Din Inima campaign, trainings, trade fairs, and served as project partner. CEED II views APIUS as a successor for many of its initiatives. In 2014 APIUS increased membership by 21 members, as it became more visible to the industry through its activities joinly implemented with CEED II.

**B2. Home Furnishings Industry**

- The Furniture Association was properly registered and increased its members. With support from CEED II, the association was properly registered as an association of companies rather than individuals, and became fully functional. It consists of 17 active members paying annually their fees of a total of €17,000. The association has a corporate image, and a website was created. This allowed increased visibility of the association, better communication, and opportunity to attract new companies.
- CEED II helped open an impressive common furniture Center MOBIMALL. CEED II played a key role in opening Mobimall, the first furniture mall in the country for all Moldovan furniture producers, which opened on August 15, 2013. The project attracted the private investor, Iurie Bors Furniture Company, which invested approximately €3,500,000 in construction. Mobimall unites Moldovan producers under one roof, boosting over 15,000 square meters of retail spaces and over 3,000 furniture products from 20 furniture brands.
- MOBIMALL increased the number of its clients. Since its opening in August 2013 and due to active promotion by the furniture association during the last four months, in addition toCEED II's autumn sales promotion campaign, MOBIMALL tenants have 300 visitors per day and growing. For example, Tiara Company doubled their sales figures due to the opening of stores in Mobimall and the Comrat furniture center, and Stejaur increased its sales by 30% in total company sale since MOBIMALL opening.
- Targeted and practical trainings supported by CEED II have changed the approach and enhanced companies' knowledge about sales and sales management:
  - Association members received two sales trainings designed for owners and directors of furniture companies; all were highly appreciated by participants. Trainings were led by a TOC expert with practical experience in business strategy and sales; 40 participants were trained.

- Association members received three sales trainings for their sales staff (a total of 60 people were trained). These activities also helped consolidate the association and were received very well by both participants and directors of furniture companies.
- Two of the association members, Ergolemn and Tiara, exhibited at international exhibitions on their own during May 2013 (Ergolemn participated at a fair in Moscow and Tiara - in Bucharest).
- The *Made in Moldova* promo campaign helped build awareness about quality furniture. It was launched on May 2013 and lasted till December 2013. The message of the campaign was communicated via 13 billboards (10 in Chisinau and 3 in Cahul, Balti and Ungheni respectively), 6 light boxes, articles in 4 popular newspapers, Association's facebook page, a brochure disseminated in members' stores, and the campaign website. The campaign is ongoing in participant stores and on internet.
- New common furniture Center opened in Comrat. CEED II worked to first motivate and then support the opening of a furniture center in Comrat town in the south of Moldova by the members of the Furniture Association. As such, 5 Moldovan furniture producers joined their forces and opened a common furniture center – Cristan (2000 square meters) in Comrat, to serve the south of Moldova. CEED II helped create the brand identity and the advertising concept for this center.
- Competitiveness improved through new designs and branding. The furniture companies, Polimobil, Stejaur Tiara, Vanin and Panmobili were helped to develop new collections of products. CEED II offered assistance to 9 furniture producers - Miscare, Crinela, Panmobili, Stejaur, Prima, Ambianta, Because, Baljic Grup, and D.Solodcenko - to improve their branding and corporate identity.

**B3. Information Technology Industry**

- *IT Essentials TOT courses are expanding at a high pace*. In Year 4 of the CEED II project, (academic year 2013/2014 and the beginning of academic year 2014-2015) 62 institutions were added to the existing ones, 75 teachers were trained, and around 2600 students have been enrolled for ITE courses. Thus, from the beginning of the implementation of ITE initiative, over 3700 students were enrolled from 123 institutions from Chisinau and the regions. The best 60 ITE students had the chance to visit successful IT companies, and see what a great working environment and terrific experience an IT company can provide.
- *The Robotics program was successfully launched and is expanding.* 27 teachers of informatics and tech specialists attended the Training of Trainers on Robotics and 6 institutions are currently included in the program. The local internet provider Starnet joint the program and supported the endowment of 2 of these institutions. Over 700 children participated at the demo lessons or presentations organized by ARTICO's Roboclub; 72 children have been enrolled for the Robotics classes during spring 2014. In September 2014 the activity of the Roboclubs was restarted, and they have attracted participants for the new academic year. Thus, 60 children (split in 4 groups) have restarted the regular classes at ARTICO, 54 at the participating lyceums and another 60 students from the Robotics club at the Poly-Technical College from Chisinau.
- *The pilot project implementing the updated Informatics curriculum has started*. 60 institutions were included in the project. A total number of 66 teachers were trained, of which 44 from outside of Chisinau.
- *The first IT Center of Excellence is underway*. As a result of combined effort of several stakeholders, mediated by CEED II project, the first MoU was signed by the Prime-Minister of Moldova (countersigned by the Minister of ICT, Minister of Education, rector of the Technical University of Moldova), the USAID Country Director and the regional directors of Microsoft and IBM. USAID has committed to fund the ITCE at the initial stage. ATIC was assigned as the implementer of the project.

- *ICT career orientation days were successfully implemented.* InNovember 6-14, 2013 over 1000 students from 3 institutions - Technical University of Moldova, State University of Moldova and Academy of Economic Studies - interacted directly with representatives from nine important ICT companies, learning first-hand about the aspects of a successful career, including the main requirements and expectations from the prospective employers.
- *ICT Career promotion campaign had a great impact.* The video spot was broadcasted on 4 TV channels (Moldova 1, ProTV, Acasa TV, and Jurnal TV). Online campaign involved placing banner ads "Choose a career in IT" on 7 high traffic websites: unimedia.md, protv.md, profm.md, diez.md, totul.md, perfecte.md, noi.md. The "Aleg Cariera IT" page on Facebook registered 1000 new likes. 6 success stories in IT were produced and published online during July 1 to October 1, 2014. A series of 21 materials (articles and video coverages) were produced and published on high traffic websites: unimedia.info, diez.md, allmoldova.md. The total reach of the media campaign through all promotional channels included in the media plan is estimated at two million people.
- *5th edition of Startup Weekend Moldova was a success.* The event gathered 80 participants, 9 coaches and 7 judges from 8 countries - Moldova, Romania, Russia, Czech Republic, USA, UK, France and Lithuania. The event was a big success in terms of sustainability, as around 70% of the event attendees paid for their participation tickets.
- *The entrepreneurial community and ecosystem is attracting new members.* The Startup Roadmap workshop had over 40 unique attendees. As usual, this initiative of CEED II project attracted many new people, which is a sign of a growing interest in startups and entrepreneurship.
- *The 5$^{th}$ edition of Moldova ICT Summit was a great success.* The event had around 1000 participants and 70 speakers from 20 countries. Over 90 articles were published in the most important media channels from Moldova (TV, radio, online and printed newspapers). The Summit was organized at a very high level, and the official opening was given by the Minister of ICT, Prime Minister of Moldova, Deputy Ambassador of US, Vice President of the Parliament, General Manager of Microsoft CEE New Markets and President of ATIC. The ICT Summit banners were posted on the websites of 13 ministries and state institutions.
- *ICT Industry Competitiveness.* CEED II supported the Ministry of ICT to finalize and launch the ICT Industry "competitiveness" package at the Moldova ICT Summit, which is the legal and regulatory package aimed to raise competitiveness of ICT industry. The package was put up for public and Government review by the ICT Ministry in early May 2014. The package was developed with assistance of CEED II project and funding from the World Bank's GET Project. This package sets up the strategic framework for development of a competitive ICT industry, through the following legal/regulatory initiatives:

(i) The IT Industry Competitiveness Strategy developed with CEED II support, in coordination with the private sector. This is the country's first strategic document that regards IT as a productive industry, and sets ambitious objectives for growth of IT domestically and for export. The strategy builds on four pillars: People, Innovation, Business Environment and Market Development.

(ii) Creation of an ICT Agency for implementation of public policies in ICT, developed with CEED II support and input from the private sector. The future Agency will implement the IT Industry Competitiveness Strategy and the Digital Moldova 2020 strategy, the later approved in October 2013. Moldova was inspired by best practices from other countries, i.e. Armenia and Singapore, where such Agencies successfully operate and ensured a vigorous development of the ICT industry, especially during early stage.

(iii) A draft law on IT Parks and proposal of a "single-tax" model to streamline the tax regime for ICT companies, developed with assistance from World Bank GET project, by PWC. The main idea of this law is proposal of a virtual space, called IT Park, and

a “single-tax” model for ICT companies residents of this virtual IT park. The main objective is to streamline the doing business environment for ICT companies. This law was approved at a Government meeting in September and is awaiting approval in the Parliament.

**B4. Tourism Industry**

- *National Inbound Tourism Association (ANTRIM) was established and capacity built.* In January 2014, ANTRIM was officially registered, with 8 founders from tourism agencies, hotels, rural pensions and wineries. On March 17, 2014,the association‘s web site www.antrim.md was launched. 4 companies became association members. In June 2014, ANTRIM together with Etnogastronomica SRL applied for Rural Tourism Network in Moldova Project at Central European Initiative (CEI) fund at the EBRD.
- *International Press talking about Moldova as a tourism destination.* Two articles appeared: one article in “Horizont” magazine in France, “Krasivaia Jizni” magazine in Estonia, 3 article in ” Eat, Drink, Travel” online magazine in Canada, one article on www.cnn.com , one article in “PRESTIGIEUX Univers” magazine in France and Belgium after the fall fam tour successfully organized on October 4-9, 2013.
- *Tour operator increase their sales after individual familiarization tours organized.* Seven representatives from German, Austrian, UK and Romanian tour operators visited Moldova in familiarization tours. Eberhardt Travel GmbH from Germany began selling beginning September 2014. Orion Reisen extended the program from 4 days to 7 days stay in Moldova and created a separate wine tour for professionals and will advance in 2015. Parallela 45 is working on the first group for 2015.
- *Moldova’s tourism offer continuously enhances its visibility in target markets.* CEED II supported a delegation of 3 Moldovan tour operators to exhibit at Tour Salon in Poznan, Poland. As a result, Amadeus Travel found Polish partners to organize Ukraine-Moldova common tours in the upcoming season. Another delegation of 4 Moldovan tour operators exhibited at the CMT Travel Trade Show in Stuttgart, Germany. Many personal contacts have been established, and interest in Moldova was raised. Moreover, CEED II for the first time a press conference for 4 tourism agencies, 1 winery and ANT, so they could present Moldova to 30 journalists as a new tourism destination. As a result, about 40 articles about Moldova were published on-line in German media. During the Wine Tourism Conference IWINETC 2014, Moldova was successfully presented as an emerging wine-tourism destination.
- *Wine tourism improved and promoted on the local market.* CEED II supported the organization of wine trips to Cricova, Milestii Mici, Chateau Vartely, Purcari, Branesti and Migdal-P wineries for prices ranging from 115 to 160 MDL for local residents and foreigners during the National Wine Day. 700 people benefited from these promotional trips. A master class “Wine- a touristic guide” was organized during Wine school. More than 40 wine and tourism lovers have participated in the master class and learned about wine tourism and how you can travel and get to know a country through its wine.
- *Moldovaholiday.travel was improved and promoted on local and international markets*. A series of improvements has been made: core system updates specifically as menu update, search engine optimization, testimonials/feedback/ comments, social media optimization, CMS Update (Joomla 3.0), Romanian and Russian languages implemented, commercial zone implemented. Now it’s modern design and attractive content follows the modern web design and the information is more accessible for travelers in the target markets. CEED II organized a promotional campaign on Moldova Holiday’s Facebook page to target the UK. The advertising reached 29,371 people. The social media reached 123,000 people. As a result, Moldova Holiday gained 869 new Facebook friends, of which 600 are from the UK. In February 2014, CEED II organized online promotional competition in Moldova. Through paid advertisement, during 4 days of competition, the page was viewed by 18464 visitors and 54 new likes were gained. These types of campaigns show that the interest of local people towards new touristic places in Moldova is very high.

- *New Product Developed, promoted on local and international markets.* CEED II supported the organization of two new product seminars for 24 participants from 20 companies. As a result, a series of products were developed, promoted and/or grown:
    - IA Mania, an event to raise internal tourism, to preserve culture and traditions, took place on June 21, 2014 in Holercani village. Due to CEED II promotion support, the event was very popular and had about 6000 local and foreign guests.
    - Tatrabis launched 3 new thematic seasonal tours for 18 participants each and Explore Moldova launched a new hiking-biking route
    - Vatra Cultural Center web-site www.vatrafest.md was developed. Due to itspopularity, the first 2 events "Middle Age Festival" and " Etno - Balcanic festival" had 35,000 visitors.
    - Three Promotional Roadshow with Live Concerts of Ethnic Moldovan Music were organized in target markets, Germany, Sweden and UK. More than 700 people interested in visiting Moldova have participated in the concerts and the organized wine tastings.
    - Green Run event was successfully organized on July 5-6, 2014. During the two-day races, 66 people participated in the sports event and more than 400 people enjoyed local cuisine, handicraft exhibition and concert with local artists.
    - First Tour Trolley launched in Chisinau on August 27, 2014- Moldova's Independence Day, and had a huge interest from the media, as well as local people who were very excited to discover the city they leave in. The tour trolley had 28 excursions during 8 days of weekend and had 500 people participating in the tours.
- *CEED II and NTA memorandum of understanding signed.* As CEED II has been supporting the tourism industry development from 2012 through a wide range of activities, on August 29, 2014 CEED II and NTA signed a Memorandum of cooperation by which both parties committed to join efforts in the new tourism country brand development and the elaboration of the marketing strategy that will emphasize joint actions to promote Moldova as a tourist destination as well as to consolidate sector actions.
- *Public-private partnership established for the new country brand and marketing strategy on the way.* CEED II decided to support the National Tourism Agency by creation of a new visual identity for the country image, which would correspond to the tourism offer. CEED II started the process of country brand development of the tourism industry, along with a Marketing Strategy and Promotion Plan. This will set the foundation for a coherent country positioning and promotion of Moldova's touristic offer abroad. CEED II is working with the NTA that these be developed in strong collaboration with the private sector and the civil society. As such, the first draft Strategy was developed with CEED II assistance and will be consulted with the stakeholders, to be approved by end 2014.
- *Promotional videos developed.* CEED II assisted in the improvement of the country promotion video that was originally developed by NTA, being strongly criticized by the private sector. The new 50-second and 30-second videos were developed, and the 6-minute one was improves, to be screened during international exhibition. This is a result of a successful partnership between local specialize authorities, private sector and supported by CEED II. Around 15 TV and online channels wrote about the new spot. Meanwhile, the video was published on the Moldova Holiday Youtube channel and during the first week it had 40,000 views.

### B5. Wine Industry

- *The National Office for Wine and Vine established institutionally and operationally.* The ONVV has had a successful start-up, even if quite difficult and slow in the beginning. The new model has been tested in practice and it has shown its viability. The ONVV director and staff have been selected by transparent competition, based on professional criteria and expertise. The MAFI and wine sector associations have begun cooperating in the ONVV supervision, within the Council for Coordination, who had periodical sessions for important matters.
- *The National Wine and Vine Fund formed 50/50 by private and public contributions.* Accordingly to the Law, the wineries have paid their mandatory contributions (per ton of grape and liter of

wine and spirits) to the Wine and Vine Fund, and the Ministry of Finances has ordered the payment of the State's share, equal to the private sector contributions raised in 2013. Consequently, the Wine and Vine Fund managed by the ONVV in 2014 is about 26 million MDL (~1.8 million US dollars), and is planned to be around 24 million MDL in 2015.

- *The ONVV developed and approved a Annual Work Plan, a Monitoring & Evaluation plan and a Reporting Regulation*. With support from CEED II experts, the ONVV followed the proposed PMP models and developed the annual activities' plan, M&E program, and the institutional budget according to the international standards, which were approved by the Council for Coordination.
- *ONVV executive staff and the Council for Coordination became familiar with the Austrian wine industry experience.* As a result of the 5-days study visit in Austria, organized by USAID CEED II project, the ONVV staff and the Coordination Council members became fully convinced of the right path of reforming the wine sector of Moldova. In addition, the wine sector leaders had the possibility to strategize and to plan together the further ONVV actions in the wine industry.
- *Three public-private platforms for consultations created by ONVV.* Following CEED II recommendations, ONVV decided to establish specialized consultative platforms on the following topics: viticulture, winemaking council and marketing, in order to make their activity transparent, predictable and participative for the wine sector actors.
- *Leadership of the ONVV for the advocacy of the regulatory changes (Technical Regulation Draft).* With support from CEED II project and from the Council of coordination, the ONVV undertook the role of counterpart of the MAFI on the PGI/PDO subject. In this regard, the ONVV submitted written proposals for the modification of the draft Technical Regulation and participated to a dozen of meetings and reunions, including at the Government and Ministry of Economy.
- *ONVV role and activities promoted professionally throughout a local PR&communication campaign.* Starting with August, CEED II assisted ONVV in accessing professional PR & communication services to manage a local campaign, and improved the public perception on ONVV activities and increased awareness about its role in the wine sector. More than 150 media appearances have been monitored in the August-September 2014, generated by ONVV activities.
- *A new wine country brand, "Wine of Moldova. A legend alive" developed with project assistance and unveiled by US Secretary of State John Kerry.* The wine country brand program succeeded to unify the entire wine industry, including the conservator wing and the new generation wineries, around strategic ideas, objectives and symbols. The development such a complex program and brand Wine of Moldova, and its embracement by the wine sector represents a true success, and a strong pathway for the future development of the industry. The national launch of the Wine of Moldova was highly attended by the US Ambassador Moser and Moldovan officials.
- *International and US media talking about wines of Moldova and the new wine brand*. Following the US Secretary's visit in Moldova, and later the Wine of Moldova trade mission in the USA and the promotion activities in the EU have resulted in some articles of very important media outlets have posted mentioning the wine potential of Moldova, the new national wine brand, including the new strategy of the ONVV. Such media as : ABC news, New York Times, Bloomberg, Foxnews, Euronews, BBC, The Economist, etc., have released news about Moldovan wine industry.
- *The Wine of Moldova brandbook fully developed.* Based on the generic brandbook, CEED II supported the development of the indispensable designs of marketing and presentation materials for the Wine of Moldova brand promotion. Among these: a product brochure, a booth design concept, corporate materials, banners, etc., all indispensable for the implementation of the Wine of Moldova promotion program.
- *Wine of Moldova presentation web-site developed.* CEED II supported the development of a web-site for the Wine of Moldova, one key communication tool for the promotion program. The new site is build based on the Wine of Moldova USP, the brandbook, the legends and the values that support the country brand. The content of the web-site is being a valuable resource for further communication activities of the ONVV.

- *A complex Wine of Moldova program handed for implementation.* CEED II project has strived to support to the wine industry to concentrate to developing a complex program for generic promotion, and not focusing only on the logo and visual image. Consequently, such policy documents have been developed with CEED II support : the Marketing&Promotion Framework; the Annual marketing plan; the brandbook; the communication strategy, alongside with the sustainability framework (ONVV & FVV ) and the legal&enforcement concept.
- *International launch of the "Wine of Moldova" at ProWein wine fair (Dusseldrof, Germany).* The presentation of the new Wine of Moldova marketing program has been organized professionally within the most important wine exhibition of Europe, ProWein 2014. An international press conference; 7 master classes with a selection of Moldovan wines, guided by the internationally reputed Master of Wine Caroline Gilby, and an impactful national booth have all contributed to achieving a notable presence of the Wine of Moldova at ProWein. Around 30 wine journalists from important media and more than 200 professional guests have participated to the master classes at the national booth.
- *Qualitative business results at ProWein 2014.* The 13 participating wineries have noticed an increased interest on behalf of the visitors to the Wine of Moldova booth. They have accumulated more new contacts as usual and had around 130 business meetings. Five new contracts are being negotiated in result of the exhibition, and are close to be signed for new wine exports to : Slovakia, Poland and United Kingdom. In result of the consistent PR activities, more than 30 posts and articles have been dedicated to Wine of Moldova participation at ProWein.
- *New wine exports shipped in 2014, in result of ProWein 2013, supported by CEED II project.* Chateau Vartely has got 2 new export contracts to United Kingdom, in result of their participation at ProWein 2013. The two importers placed a first order of 1700 bottles of premium wines, and plan to increase with 50 % in 2015. Asconi also fructified a contact from 2013 ProWein edition, and has signed a contract with one of the most important Slovakian importer&distributor, shipping in 2014 about 120 thousands bottles of quality wines (~EUR 2/bottle average price), and planning to increase with 25 % in 2015. In 2014, Migdal P has further increased its sales with 40 % to another Slovakian importer found at ProWein 2012.
- *Wine of Moldova successfully launched on three key European target markets: Czech Republic, Poland and Romania.* ONVV, with CEED II assistance, informed about 50 wine importers about the advantages of the new program and invited them to become partners in its implementation. Based on this, ONVV has built the promotion campaigns on that market, benefiting of the local operators' support.
- *Promotion campaign implemented in Ukraine.* During November 2013-June 2014 (planned before the strikes begun), with CEED II support a PR&promotion campaign was implemented in Ukraine, including : 4 master classes for HORECA segment and wine importers; 1 week "Wine of Moldova" in 5 selected Ukrainian restaurants; 4 articles dedicated to Moldovan wine in local leading journals; management of the special Facebook of Moldovan wines in Ukraine. 5 restaurants from Kiev are ready to include Moldovan wines in their menus, while Fautor wines have been included in the wine list by one of the most respected restaurants in Kiev, «Старый Рояль» ("Old Royal").
- *37 gold, silver and bronze medals at Bucharest OIV international wine competition.* With CEED II support, 110 Moldovan wine samples have been included free of charge in the Bucharest International Wine Contest (BIWC) winning 37 medals, a record for Moldova. This constituted a launch of the Wine of Moldova in Romania and has had good PR in local media.
- *Fautor increased wine sales in Romania by 30% and entered main retail and HoReCa segments.* Supported by CEED II project, Fautor penetrated the Romanian market in 2013, succeeding the develop their distribution and had increased their sales in 2014 by 30 %. Additionally, Fautor continued growing their positions on the domestic market by 20 %.
- *Gitana winery successfully entered the Romanian market and made first shipment.* In result of the participation to the promotion events organized with support from CEED II (GoodWine, Wine Gala, wine press trip, etc.), Gitana winery got sufficient contacts and awareness to start-up the penetration of the Romanian market. During 2014, Gitana winery succeeded to enter about 20

restaurants and wine shops in Bucharest, and had managed a PR campaign that promoted the wines' image in Romania.

- *Chateau Vartely entered to the biggest Polish distribution channel(Bedronka) and to UK market.* Following the company's participation at the promotion events&campaigns in Poland and at ProWein, Chateau Vartely has succeeded to expand significantly their sales to Poland (120 thousand bottles more). Also, Vartely has entered new markets, such as United Kingdom, Canada, and currently negotiating with two new US distributors.
- *Increased domestic wine market by 20 %.* The Moldovan wine market has shown a growth of about 20%, based on wineries' and professional estimates. This was impacted directly by the activities managed by CEED II, including : the wine culture promotion; the legislative reform; the wine events and PR; the promotion of the sommelier profession; the development of new wine products&brands; etc.
- *32 European sommeliers from 6 countries have discovered Moldovan wines and undertook to support their promotion on the European market.* The Association of the Sommelier of Europe has organized its General Assembly in Moldova and this event had a very positive impact on the local market, but also on some European sommelier journals from France, Switzerland and Italy Additionally the sommeliers have initiated negotiations with local wineries for wine exports to Benelux and Switzerland.
- *A new and innovative concept for the National Wine Day, organized with participation of the private sector.* After four years of a very crowded and incoherent Wine festival, the event was brought back to the capital center and included new elements: Wine School, Wine Road, PGI promotion; new brand and wine glasses for consumers. About 80 thousand wine bottles have been sold during the two days of the fest, to the 150 thousands visitors, among which some 3000 tourists.
- *Two new editions of the Wine Vernissage successfully organized by the ONVV.* The event became sustainable, being funded by wineries and ticket sales. Around 600 persons participated at the Wine Vernissage, enjoying the quality wines and becoming initiated in the wine culture. The Prime Minister, US Ambassador Moser, Moldovan politicians, but also journalists and VIPs have attended the event, contributing to promoting the event in the local media.
- *The first promotion of 15 Sommelier graduated at UTM.* The sole course for sommelier education, accredited by the Ministry of Education has had its first group of graduate sommeliers, who received the official diploma of sommelier.
- *250 young people initiated in wine culture on at Wine School.* 11 master classes have been organized within the Wine School, at the ExpoVin 2014.
- *A new project on the development of the Wine and Vine Registry launched.* In may 2014, USAID and Czech Aid have signed an agreement with the MAFI on the financing of a new project of 1 million USD for the development of the Vineyard Cadaster and the Wine traceability, within a Wine and Vine Registry. This was possible due to the legislative and institutional reform promoted with support from CEED II project.

**B6. Cross-cutting Finance & Investment Activities**

- *A new DCA activity started.* USAID/Moldova entered into a co-guarantee partnership with SIDA supporting access to finance for implementation of energy efficiency activities for SME and individuals. The proposed guarantee is a 15-year $3.5 million signed with Prime Capital. Under new DCA in energy efficiency purpose, during July-September 2014, Prime Capital placed 11 loans (total utilization of $115,625, which represents 3.28% utilization rate), all of them being taken by individuals for residential improvements with energy efficiency impact.

- *CEED continued to support USAID's DCA Loan Guarantee Program*. CEED II focused on ongoing communication with and provided advice to financial institutions implementing the DCA activities. Two meetings with the Comertbank and Rural Finance Corporation management were organized. As result, by September 30, 2014, 40 loans in total amount of

$1,305,000 were placed under the USAID Guarantee that is twice better achieved result compared to the period September 2011- September 2013, when 20 loans in total amount of $614,500 were placed.

- *CEED II supported the* ***development of an investment plan for Divib Media*** *LTD winery*. This was possible through CEED II assistance related to the EIB credit line of €75 million that has been allocated for the production of GI/PDO wines. The intention is to plant 20 ha of technical vineyards (8 different types) in Criuleni area under the ECO label. The investment plan is also incorporating the vineyard plantation plan. The total volume of the investment project is 354,000 EUR. The winery is ready to come up with 204,000 EUR own contribution.

## SECTION IV

# Technical and Administrative Support

### A. Administration and Finance

CEED II's administrative and financial management systems are in place and functioning well.

### B. Project Communications

CEED II's activities implemented during the reporting year made our partners and stakeholders aware of the project's mission, objectives, activities, and achievements, and helped policymakers in Moldova and U.S. know about our work and successes accomplished. All activities were mostly linked directly to our technical activities. To efficiently communicate about CEED II impact we used the following channels:

*Local & international press.* CEED II activities were regularly reported by and covered in local as well as (when applicable) international media. Its activities were featured in more than *164* print articles (an increase of app.*74* articles); *736* articles and/or videos on the Internet (vs. *512* in year 3); and through *127* TV news, shows etc. on TV channels (50 increase), 4 radio programs/interviews etc. Most of the communications products are listed in Appendix III.

Figure 54. USAID CEED II activities were featured in more than *164* print articles, *736* articles and/or videos on the Internet, as well as through *127* TV news, show etc. on TV channels etc.

*Website.* During the reported year,October 2013- September 2014, CEED II continued to regularly update the project website – www.ceed.md – with project highlights, upcoming and past events, placing related banners to feature its activities, etc.

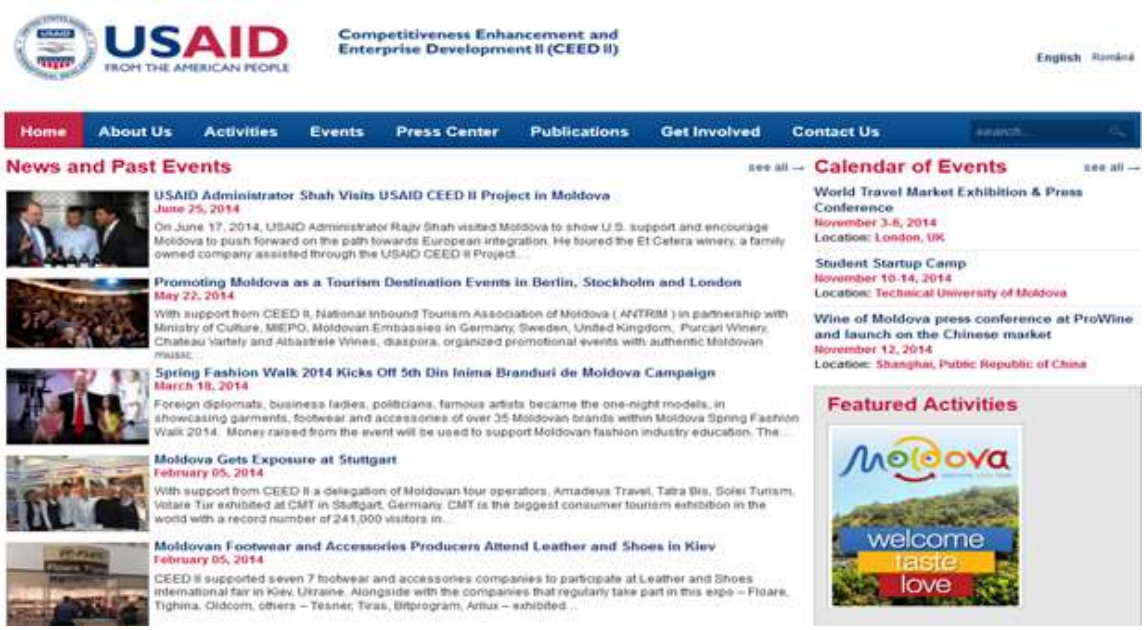


Figure 55. A screen-shot of CEED II'swebsite

*Facebook.* CEED II continued to share information about project events through its Facebook page https://www.facebook.com/USAID.CEED.II.project?ref=tn_tnmn#!/USAID.CEED.II.project. By the end of the reported year, 1,800 people had "Liked" the USAID CEED II page. Project-initiated pages for other events such as the Dininima.md (9,700 Likes), Moldova ICT Summit 2,590 Likes), Startup Weekend Moldova (2,080 Likes), and, Aleg Cariera IT (2, 420 Likes), APIUS (573 Likes), Vernisajul Vinului (1,389 Likes), Wine of Moldova (4,170 Likes), Moldova Wine Day (2,700 Likes) etc. also proved very popular. The project website (www.ceed.md) and Facebook page were regularly updated, with the USAID CEED II, partners' pages, joint related activities highlighted and shared.

Figure 56. CEED II facebook coverpage

*USAID.* Throughout the reported year, CEED II regularly submitted its "calendar of activities" to USAID for inclusion on the Mission website and other info outlets as needed. In addition, CEED II organized several site visits for visiting USG officials thereby highlighting USAID's work in Moldova and its impact. More branded project highlights/success stories highlighting the project

successes were finalized and submitted to USAID— *Together at the Table: Furniture Producers Join Forces, Moldovan Furniture Producers under One Roof,* and *Marketing Made in Moldova*. Seven of CEED II events briefs— *USAID Support Helps Boost Moldovan Wine Industry,* S*pring Fashion Walk 2014 Kicks Off 5th Din Inima Branduri de Moldova Campaign, USAID Administrator Dr. Rajiv Shah Visit to Moldova, Developing a Public-Private Partnership for an Information Technology Center of Excellence, Proudly Made in Moldova – Fall Fashion Walk 2014, Discover Chisinau via a Sightseeing Trolleybus,* and *Moldova Holds Annual Wine Festival* — were published in USAID Regional Mission to Ukraine, Belarus and Moldova Bi-Weekly ReCap issues.

In addition, all CEED II communications materials (i.e. USAID CEED & CEED II Activity Map, fact sheets, banners, folders, brochures, other related printed and online materials, project initiated pages, websites etc.) were compliant with USAID branding regulations and were used consistently by project team members in their everyday communication with the stakeholders and partners. Throughout the reporting year, we ensured that branding and marking guidelines were respected during technical events, local and international publications, and promotional activities in CEED II target industries.

Finally, CEED II developed and maintained good relations and fruitful cooperation with government through regular consultations, meetings, written communication, signing MOUs, formalizing the partnerships for certain activities, and highlighting joint events and accomplishments.

## C. Monitoring & Evaluation

During the reporting year, the project staff collected data from beneficiaries and other counterparts for the annual reporting. Support was provided to the staff to dully fill in the database with the quantitative indicators, and perform evaluations of the activities to measure impact. Additionally, CEED II project prepared for exit from furniture industry activities that closed at the end of December 2013. In this regard, an assessment for quantitative data for M&E was conducted internally for furniture industry and all electronic files have been checked to be in strict correspondence with paper files.

Additionally, CEED II conducted an in-depth internal audit of M&E files and database inputs. All indicators' figures have been reviewed for accuracy, all implemented events and reported events have been compared, and paper and electronically files analyzed. Main discovery was that not all CEED II activities have been reported in the database and captured in reports. Particularly, it referred to the indicator 06 "investments in workforce development initiatives" where in first 3 years were reported only investments in workforce development initiatives made by assisted companies, ignoring other clusters actors that are included in the indicator definition. As a result, additional ICT investments were reported as well as other ATIC initiatives. In fashion industry, several unreported Fashion Show events were added, as well as fashion companies' investments into the Din Inima Promo Campain. One unreported Familiarization Tour was added to the Tourism sector reporting. Additionally, several typing errors related to indicators figures have been corrected.

CEED II's results to-date are reported in Section III above and in Appendix I.

## D. Environmental Compliance

No activities implemented during Year 4 had a negative impact on the environment.

## SECTION V

# Level of Effort (LOE) and Financial Reports

The following tables provide a summary of CEED II's LOE usage and expenditures for Year 4 and a monthly budget forecast for Year 5, Fiscal Year 2015.

### A. Level of Effort Report

| Labor Category | July 2014 | August 2014 | September 2014 | LOE to Date | Contract Total | Remaining LOE |
|---|---|---|---|---|---|---|
| Key Personnel Long-Term Technical Assistance | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| CCN Long-Term Technical Assistance (excluding Key Personnel) | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| Expatriate Short-Term Technical Assistance | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| CCN Short-Term Technical Assistance | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| Home Office Support | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| **Total** | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |

### B. Financial Reports

B1. Expenditures through Project Year 4, Fiscal Year 2014

| Category | July 2014 | August 2014 | September 2014 | Expenses to Date | Life of Project |
|---|---|---|---|---|---|
| Direct Labor Dollars | [redacted] | [redacted] | [redacted] | [redacted] | **Contract Value** |
| Fringe & Overhead | $[redacted] | [redacted] | [redacted] | [redacted] | |
| Travel & Transportation | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| Allowances | [redacted] | [redacted] | [redacted] | [redacted] | |
| Other Direct Costs | [redacted] | [redacted] | [redacted] | [redacted] | **Obligation** |
| Equipment | [redacted] | [redacted] | [redacted] | [redacted] | |
| Subcontracts | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| SEED Fund | [redacted] | [redacted] | [redacted] | [redacted] | |
| G&A (incl. SEED Fund G&A) | [redacted] | [redacted] | [redacted] | [redacted] | **Percentage of Obligation Spent** |
| *Total Estimated Cost* | [redacted] | [redacted] | [redacted] | [redacted] | |
| Fixed Fee (incl. SEED Fund Fee) | [redacted] | [redacted] | [redacted] | [redacted] | [redacted] |
| **Total Estimated Cost & Fixed Fee** | [redacted] | [redacted] | [redacted] | [redacted] | |

B2. Forecasted expenditures for Project Year 5, Fiscal Year 2015

| Month | Forecast | Life of Project |
|---|---|---|
| October 2014 | [redacted] | |
| November 2014 | [redacted] | **Contract Value** |
| December 2014 | [redacted] | [redacted] |
| January 2015 | [redacted] | |
| February 2015 | [redacted] | **Obligation** |
| March 2015 | [redacted] | |
| April 2015 | [redacted] | [redacted] |
| May 2015 | [redacted] | |
| June 2015 | [redacted] | **% of Obligation Programmed through FY2015** |
| **FY2015 Forecast** | [redacted] | |
| *FY2011 - FY2014 Expenditures* | [redacted] | |
| **Total Costs Forecasted through FY2015** | [redacted] | [redacted] |

# APPENDIX I

**Performance Indicator Chart**

## PMP Performance Indicator Chart

| | Indicator | Detailed Description | Unit | Disaggregation | Justification/Management Utility | Data Source | Data Collection / Reporting Frequency | Baseline | Targets[1,2] |
|---|---|---|---|---|---|---|---|---|---|
| **Project Purpose: To grow and expand the competitiveness and efficiency of key strategic industries in Moldova leading to increased sales and investment.** | | | | | | | | | |
| **1** | **Increased sales of assisted enterprises** | Average percent change in value of sales (foreign and domestic) generated by assisted enterprises in the targeted industries, including sales of assisted business service providers (BSPs) | *Percent* (Average percent change in value of sales) | Target industry, women-owned enterprises, size of enterprise | Sales are a key measure of enterprise growth. Rapid increases in sales growth is the primary factor leading to rapid increases in job creation. Additionally, sales growth is a key indicator of economic health and competitiveness within targeted industry clusters. | Enterprises, associations, and BSPs | Data collected quarterly, reported annually | Variable: The 4 quarters prior to the reporting period (year) in which assistance began for each company | Yr 1: +10%<br>Yr 2: +10%<br>Yr 3: +10%<br>Yr 4: +10%<br>Yr 5: +10%<br>**PA : +10%** |
| **2** | **Increased investment in assisted enterprises** | Percent change in value of investment (FDI and domestic investment) in assisted enterprises in targeted industries, including equity and reinvested profit | *Percent* (Percent change in value of investments) | Target industry, women-owned enterprises, size of enterprise | Investment is a key measure of enterprise growth. Growing amounts of investment by and in an enterprise or industry reflects increasing activity and growing confidence in future business opportunities. Additionally, investment growth is an indicator of economic health and industry competitiveness. | Enterprises, including BSPs, National Bank of Moldova and investors | Data collected quarterly, reported annually | Variable: The 4 quarters prior to the reporting period (year) in which assistance began for each company | Yr 1: +15%<br>Yr 2: +15%<br>Yr 3: +15%<br>Yr 4: +15%<br>Yr 5: +7.5%<br>**PA: +15%** |
| **Objective 1: Productivity of targeted industries increased.** | | | | | | | | | |
| **Expected Result 1.1: Use of improved technologies and business processes within target industries increased** | | | | | | | | | |
| **3** | **Enterprises receiving project-related assistance to improve their knowledge, processes, and technologies[3]** | Number of unique enterprises receiving direct or indirect assistance from the project to improve their knowledge about better processes and technologies that will enhance productivity and/or improve products and services etc. | # | Target industry, women-owned enterprises, size of enterprise | Productivity enhancement is integral to increased competitiveness. Better business processes and technologies can aid in this. As enterprises improve their productivity they can more easily sell their goods and services profitably for sustained periods of time and access increased amounts of financing and investment. | Project records and grantees as applicable | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 50<br>Yr 2: 85<br>Yr 3: 70<br>Yr 4: 15<br>Yr 5: 8<br>**LOP: 305** |

[1] The target for Year 5 is a half-year target.

[2] End of Project targets are named Project Average (PA) for the average results expressed in percentage for and Life-of-Project (LOP) for cumulative achieved results measured in figures. All LOP targets are calculated as Year 5 Target plus Years 1-4 Actuals. For Indicators 3, 4, 7, 10, 13, 16, 19, 20, 21, 22, LOP exceeds the sum of Years 1-5 targets as CEED II achieved greater results and exceeded targets set for Years 1-4.

[3] CEED II will use Indicator no. 3 as a proxy for standard F-indicator 4.6.2, "*Number of firms receiving USG supported assistance to improve their management practices*"

| | Indicator | Detailed Description | Unit | Disaggregation | Justification/Management Utility | Data Source | Data Collection / Reporting Frequency | Baseline | Targets[1,2] |
|---|---|---|---|---|---|---|---|---|---|
| 4 | **Assisted enterprises applying improved knowledge, processes, and technologies** | Number of unique enterprises that are applying lessons learned and new knowledge from technical assistance received directly or indirectly from the project | # | Target industry, women-owned enterprises, size of enterprise | Improved processes and technologies are integral to increased competitiveness. However, project-related measures to increase productivity will only be effective if enterprises apply what they learn. This indicator measures the effectiveness and sustainability of project-related technical assistance. | Enterprises, BSPs, associations, grantees as applicable, and project staff | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 35<br>Yr 2: 55<br>Yr 3: 45<br>Yr 4: 25<br>Yr 5: 5<br>**LOP: 230** |
| 5 | **Increased productivity of assisted enterprises** | Average percent change in the value of sales per employee | *Percent* (Average percent change in value of sales per employee) | Target industry, women-owned enterprises, size of enterprise | As firms increase their productivity, they should be able to increase sales per employee through more efficient operations or through increase sales volumes, or both. This measures whether productivity efforts are working. | Enterprises | Data collected quarterly, reported annually | Variable: The 4 quarters prior to the reporting period (year) in which assistance began for each company | Yr 1: +2%<br>Yr 2: +3%<br>Yr 3: +6%<br>Yr 4: +6%<br>Yr 5: +6%<br>**PA : +4.6%** |
| **Expected Result 1.2: Capacity of the workforce in targeted industries increased** | | | | | | | | | |
| 6 | **Increased investments in workforce development initiatives by assisted enterprises or other cluster actors** | The value of investments in workforce development initiatives by industry stakeholders, such as in-company training programs in assisted enterprises or launching a new vendor-based training program at an university | *Percent* (Percent change in value of investments) | Target industry and type of enterprise or cluster actor, and women-owned enterprises | Increased investment in workforce development indicates that there is an increased understanding of the higher level of skills and knowledge needed to build the capacity of the workforce to respond to the market demand. Increased workforce capacity enhances competitiveness. | Enterprises, including BSPs, and other cluster actors (including the GOM and grantees), and project staff | Data collected quarterly, reported annually | Variable: The 4 quarters prior to the reporting period (year) in which assistance began for each company or other actor | Yr 1: +10%<br>Yr 2: +10%<br>Yr 3: +10%<br>Yr 4: +10%<br>Yr 5: +10%<br>**PA : +10%** |
| 7 | **Participants in project-related trainings or capacity building programs[4]** | Number of people that participate in trainings and other capacity building programs directly delivered by the project, or facilitated by the project and delivered by other cluster actors, including enterprises or academic institutions | # | Target industry, type of provider (project, enterprise, BSP, or academic institution), and sex | Increased access to knowledge through quality training and other forms of capacity building programs results in a more skilled and adaptable workforce. Increased workforce capacity enhances competitiveness. | Project records, associations, BSPs, and grantees as applicable | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 700<br>Yr 2: 1,000<br>Yr 3: 1,650<br>Yr 4: 1,650<br>Yr 5: 500<br>**LOP: 12,800** |
| **Expected Result 1.3: Capacity of industry service providers and other value chain actors increased** | | | | | | | | | |

[4] CEED II will use Indicator 7 as a proxy for standard F-indicator 4.6.3, "*Number of persons participating in USG-funded workforce development programs*".

| | Indicator | Detailed Description | Unit | Disaggregation | Justification/Management Utility | Data Source | Data Collection / Reporting Frequency | Baseline | Targets[1,2] |
|---|---|---|---|---|---|---|---|---|---|
| **8** | **Assisted enterprises paying more for BSP services with some or all of their own resources** | Percentage (weight) of assisted enterprises in targeted industries paying more for BSP services | *Percent* | Target industry, women-owned enterprises | As the capacity of BSPs and other cluster actors increases, enterprises are more apt to pay for their service. | Enterprises, BSPs, associations, grantees as applicable and project staff | Data collected quarterly, reported annually | -NA- | Yr 1: 10%<br>Yr 2: 15%<br>Yr 3: 20%<br>Yr 4: 25%<br>Yr 5: 30%<br>**PA : 20%** |
| **Objective 2: Trade and investment in targeted industries increased** | | | | | | | | | |
| **Expected Result 2.1: Quality of products and services produced by enterprises in targeted industries improved** | | | | | | | | | |
| **10** | **Enterprises participating in project-related programs to enhance trade and investment capacity** | Number of unique enterprises receiving direct or indirect assistance from the project to improve their trade and investment capacity | # | Target industry, women-owned enterprises, size of enterprise | Monitoring the number of trainings on topics related to investment capacity building and improving trade is a means for the project to monitor the ability of local firms to progress towards or meet international standards for improved international trade. | Project records, associations, BSPs, and grantees as applicable | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 50<br>Yr 2: 85<br>Yr 3: 70<br>Yr 4: 15<br>Yr 5: 8<br>**LOP: 240** |
| **11** | **Assisted enterprises following recognized product or process standards[5]** | Percentage (weight) of enterprises that introduce new recognized product or process standards or methodologies, appropriate to their target markets, whether or not they have been officially certified | *Percent* | Target industry, women-owned enterprises, size of enterprise, | Enterprises that adhere to recognized product and process quality standards, whether or not formally certified, are likely to be more competitive and seen as creditable partners. | Enterprises, BSPs,associations, grantees as applicable, and project staff | Data collected quarterly, reported annually | -NA- | Yr 1: 5%<br>Yr 2: 10%<br>Yr 3: 15%<br>Yr 4: 20%<br>Yr 5: N/A<br>**PA : 20%** |
| **Expected Result 2.2: Positioning and promotion of products and services from targeted industries in new or existing markets improved** | | | | | | | | | |
| **12** | **Assisted enterprises expanding sales to new or existing markets** | Number of unique assisted enterprises expanding sales to new or existing markets (domestic and export) | # | Target industry, women-owned enterprises, , size of enterprise | Sales growth is a key indicator of increased competitiveness. This indicator also complements the "value of sales" indicator by demonstrating how widespread the benefits are; whether sales increases are due to only a few firms or spread among many. | Enterprises, associations, BSPs (including grantees as applicable), and project staff | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 35<br>Yr 2: 55<br>Yr 3: 45<br>Yr 4: 25<br>Yr 5: 0<br>**LOP: 160** |
| **13** | **Assisted enterprises exhibiting at trade shows or participating in business-to-business (B2B) events** | Number of enterprises (non-unique) participating or exhibiting at trade shows or B2B events (foreign or domestic) | # | Target industry, women-owned enterprises, size of enterprise | Participation at trade shows and B2B events puts enterprises in front of potential buyers, it will also help to raise the profile and image of Moldova. | Project records, enterprises, associations, and BSPs | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 20<br>Yr 2: 25<br>Yr 3: 30<br>Yr 4: 25<br>Yr 5: 50<br>**LOP: 1,100** |

[5] This type of assistance has ended in Year 4.

| | Indicator | Detailed Description | Unit | Disaggregation | Justification/Management Utility | Data Source | Data Collection / Reporting Frequency | Baseline | Targets[1,2] |
|---|---|---|---|---|---|---|---|---|---|
| **Expected Result 2.3: Access to financing and investment by enterprises in targeted industries increased** | | | | | | | | | |
| **14** | **Increased financing accessed by assisted enterprises** | Percent change in value of financing accessed by assisted enterprises in targeted industries | *Percent* (Percent change in value of accessed financing ) | Target industry, women-owned enterprises, size of enterprise | Expansion of both commercial bank and non-bank finance reflects expected increases in enterprise sales and growing ability of enterprises and financial institutions to measure and manage business and financial risks. This indicator will allow the project to monitor finance trends in target sectors. | Enterprises, including BSPs, and financial institutions | Data collected quarterly, reported annually | Variable: The 4 quarters prior to the reporting period (year) in which assistance began for each company | Yr 1: +10%<br>Yr 2: +10%<br>Yr 3: +10%<br>Yr 4: +10%<br>Yr 5: +5%<br>**PA : +10%** |
| **15** | **Assisted enterprises with increased financing or investment in target industries** | Number of assisted enterprises (non-unique) that are able to access greater amounts of financing or investment | # | Target industry, women-owned enterprises, size of enterprise | Increased financing and/or investment is a key indicator of increased competitiveness and growth. | Enterprises, including BSPs, and financial institutions (including grantees as applicable) | Data collected quarterly, reported annually | Zero (0) | Yr 1: 25<br>Yr 2: 45<br>Yr 3: 40<br>Yr 4: 15<br>Yr 5: 5<br>**LOP: 130** |
| **Objective 3: Public-private dialogue improved leading to a better business environment for targeted industries.** | | | | | | | | | |
| **Expected Result 3.1: Viability and number of industry associations and member-based organizations increased** | | | | | | | | | |
| **16** | **Associations or member-based organizations demonstrating increased leadership in target industries** | Number of associations (or member- based organizations) providing leadership[6] to targeted clusters, such as coordinating industry-level activities or initiatives, developing a strategy document, holding industry meetings, etc | # | Target industry | Associations providing leadership to targeted industries is an indicator of their viability and contributes to the overall development of the industry cluster. | Associations and other member-based organizations | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 4<br>Yr 2: 4<br>Yr 3: 2<br>Yr 4: 0<br>Yr 5: 0<br>**LOP: 23** |
| **17** | **Increased revenues of associations or member-based organizations** | Average percent change in value of revenues of industry associations and member-based organizations from self-generated sources | *Percent* (Average percent change in value of revenues ) | Target industry | An increase in self-generated revenue of industry associations indicates sustainability and effectiveness of the associations to respond to the private sector. | Associations and other member-based organizations | Data collected quarterly, reported annually | Variable: The 4 quarters prior to the reporting period (year) in which assistance began for each assoc. | Yr 1: +10%<br>Yr 2: +10%<br>Yr 3: +10%<br>Yr 4: +10%<br>Yr 5: +10%<br>**PA : +10%** |

Increased leadership means that associations are more active than before receiving USG support; this includes but is not limited to actively seeking new members, proactively developing an annual activity plan, working to promote their members' interests, and/or engaging with public sector policy makers,

| | Indicator | Detailed Description | Unit | Disaggregation | Justification/Management Utility | Data Source | Data Collection / Reporting Frequency | Baseline | Targets[1,2] |
|---|---|---|---|---|---|---|---|---|---|
| **18** | **Member satisfaction level of associations or member-based organizations** | The average percentage (weight) of members of associations and member-based organizations that are satisfied with the organizations' performance | *Percent* (Average Percent of satisfied members) | Target industry | Members that are satisfied or very satisfied with associations or member based organizations | Associations and other member-based organizations | Data collected annually, reported annually | -NA- | Yr 1: 50%<br>Yr 2: 55%<br>Yr 3: 60%<br>Yr 4: 65%<br>Yr 5: 65%<br>**LOP[7]: 65%** |
| **Expected Result 3.2: Private sector capacity for advocacy and policy analysis increased** | | | | | | | | | |
| **19** | **Participants at project-related trainings or workshops about advocacy or policy analysis** | Number of participants at project-related trainings or workshops about lobbying, advocacy or policy analysis | # | Target industry | The number of participants at trainings or workshops about lobbying, advocacy or policy analysis will indicate the depth of exposure or knowledge within the industry about this. | Project records, associations, BSPs, and grantees as applicable | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 50<br>Yr 2: 100<br>Yr 3: 100<br>Yr 4: 50<br>Yr 5: 50<br>**LOP: 820** |
| **20** | **Policy or position papers published or commissioned by assisted associations or member-based organizations** | Number of policy or position papers published or commissioned by associations or member-based organizations, including industry strategy papers, policy review papers, memoranda between private and public sector, etc. | # | Target industry | The number of policy papers or memoranda published by private sector is an indicator of increasing influence of the private sector to advocate for a better business enabling environment. | Associations and other member-based organizations | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 5<br>Yr 2: 10<br>Yr 3: 10<br>Yr 4: 10<br>Yr 5: 1<br>**LOP: 40** |
| **Expected Result 3.3: Understanding by the public sector of private sector concerns and actions taken to improve conditions for targeted industries increased** | | | | | | | | | |
| **21** | **Consultative meetings or events between reps. from the public and private sectors as a result of project assistance** | Number of consultative meetings or events between representatives of the public and private sectors to discuss ways to improve the business environment facing targeted industries | # | Target industry | The number of consultative meetings of public and private sector representatives will contribute to greater understanding between both sides and lead to more productive and constructive dialogue. | Government of Moldova sources and associations or member-based organizations | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 10<br>Yr 2: 15<br>Yr 3: 15<br>Yr 4: 10<br>Yr 5: 4<br>**LOP: 55** |
| **22** | **Government actions taken that improve the business environment in targeted industries** | Number of government actions/initiatives taken that improve the performance of selected industries; includes ordinances, government decrees, etc. | # | Target industry | Actions/initiatives by the government to improve the business environment facing targeted industries demonstrates their commitment to helping develop them. | Official Gazette, other Government of Moldova sources, and associations or member-based organizations | Data collected quarterly, reported quarterly | Zero (0) | Yr 1: 5<br>Yr 2: 10<br>Yr 3: 10<br>Yr 4: 5<br>Yr 5: 1<br>**LOP: 37** |

[7] The PA for Indicator 18 was adjusted due to change in the method of end of project target calculation.

# APPENDIX II

## List of Media Articles in Moldova

## Summary of CEED II-Related Media-Mentioned During Year 4

| Title of media product | Media Outlet/link | Date/issue |
|---|---|---|
| | **National Wine Day related** | |
| De ce cel mai mare producător de bere din RM a ajuns sponsorul festivalului vinului | Adevărul newspaper & online version http://adevarul.ro/moldova/economie/de-mai-mare-producator-bere-republica-moldova-ajuns-sponsorul-festivalului-vinului-1_524a65dcc7b855ff56e60dca/index.html?fb_action_ids=10151879188336201&fb_action_types=og.likes | Oct 1, 2013 |
| O lecție de inițiere pentru jurnaliști în arta degustării vinului | AllMoldova.md http://www.allmoldova.com/ro/viniculture/articles/225.html | Oct 1, 2013 |
| Cât vin importă republica Moldova | Adevarul.md http://adevarul.ro/moldova/economie/cat-vin-importa-republica-moldova-1_524ac36bc7b855ff56e85698/index.html | Oct 1, 2013 |
| Ziua vinului se va desfășura anul acesta după un nou concept (video) | Radio Chișinău, program & video http://radiochisinau.md/ziua_vinului_se_va_desfasura_anul_acesta_dupa_un_nou_concept_video-5218 | Oct 2, 2013 |
| Sărbătoarea vinului, neumbrită de embargo | ECOnomist newspaper & online version http://eco.md/index.php?option=com_content&view=article&id=9806:srbtoarea-vinului-neumbrit-de-embargo&catid=128:actualitate&Itemid=512 | Oct 2, 2013 |
| Gheorghe Arpentin în studioul unimedia | UNIMEDIA http://unimedia.info/stiri/video-gheorghe-arpentin-in-studioul-unimedia-66364.html | Oct 2, 2013 |
| Spaţiul public: de ziua vinului promovăm cultura consumului de vin, în detrimentul consumului cantitativ | Teleradio Moldova http://trm.md/ro/spatiul-public/spatiul-public-din-3-octombrie-2013/ http://trm.md/ro/economic/spatiul-public-de-ziua-vinului-promovam-cultura-consumului-de-vin-in-detrimentul-consumului-cantitativ/ | Oct 3, 2013 |
| Ziua națională a vinului, sărbătorită la Chișinău | DIGI.ro http://www.digi24.ro/Stiri/Regional/Digi24+Iasi/Stiri/Ziua+Nationala+a+Vinului+sarbatorita+la+Chisinau | Oct 3, 2013 |
| Stand-uri în stil naţional, butoaie artificiale şi terase amenajate, de ziua naţională vinului | Publika TV http://www.publika.md/video-stand-uri-in-stil-national-butoaie-artificiale-si-terase-amenajate-de-ziua-nationala-vinului_1616391.html | Oct 4, 2013 |
| Moldovenii sînt aşteptaţi în acest week-end la ziua naţională a vinului | Agenția de presă MOLDPRES www.moldpres.md | Oct 4, 2013 |
| Pregăteşte-te pentru două zile de chef în compania lui bachus | Adevarul.md http://adevarul.ro/moldova/actualitate/pregateste-te-doua-zile-chef-compania-bachus-1_524e983cc7b855ff56fb341e/index.html | Oct 4, 2013 |
| Ziua vinului va fi deschisă de un oficial străin. află cine este acesta şi care va fi programul evenimentului | Publika TV http://www.publika.md/ziua-vinului-va-fi-deschisa-de-un-oficial-strain-afla-cine-este-acesta-si-care-va-fi-programul-evenimentului_1617091.html | Oct 4, 2013 |
| "Ziua națională a vinului" 2013. muzică, dans, veselie, vinuri moldovenești și multe alte surprize au pregătit organizatorii | Epresa.md http://epresa.md/stirile-zilei/ziua-nationala-a-vinului-2013-muzica-dans-veselie-vinuri-moldovenesti-traditii-si-multe-alte-surprize-au-pregatit-organizatorii | Oct 4, 2013 |
| degustări de vin și excursii la întreprinderile producătoare, de ziua vinului | TIMPUL.md http://www.timpul.md/articol/degustari-de-vin-i-excursii-la-intreprinderile-producatoare-de-ziua-vinului-49364.html | Oct 4, 2013 |
| Unii au gustat deja licoarea lui bahus, pregătită pentru ziua vinului. "îmi pare calitativ, doar că trebuie promovat" | Publika TV http://www.publika.md/unii-au-gustat-deja-licoarea-lui-bahus-pregatita-pentru-ziua-vinului-imi-pare-calitativ-doar-ca-trebuie-promovat_1617911.html | Oct 4, 2013 |
| Forfotă mare în piaţa marii adunări naţionale! vinificatorii îşi instalează standurile şi pregătesc terenul pentru festivalul vinului | Prime TV http://www.prime.md/rom/news/social/item2919/ | Oct 4, 2013 |
| Degustări de vin și excursii la întreprinderile producătoare, de ziua vinului | TIMPUL.md http://www.timpul.md/articol/degustari-de-vin-i-excursii-la-intreprinderile-producatoare-de-ziua-vinului-49364.html | Oct 4, 2013 |
| Стал ли день вина в молдове национальным праздником? | Komsomoliskaya Pravda newspaper & online version KP.md http://www.kp.md/daily/26141.7/3031644/ | Oct 4, 2013 |

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| Impresionanta colecție de vinuri a ministrului Vasile Bumacov | Tribuna.md http://tribuna.md/2013/10/05/video-exclusiv-impresionanta-colectie-de-vinuri-a-ministrului-vasile-bumacov/ | Oct 5, 2013 |
| La Chişinău se desfăşoară sărbătoarea naţională a vinului | MOLDPRES news agency | Oct 5, 2013 |
| Ziua naţională a vinului va fi deschisă, pentru prima dată, de un oficial străin | TV7 http://tv7.md/ro/news/view?id=28026 | Oct 5, 2013 |
| Группа молодых людей организовала накануне дегустацию вин на открытом воздухе | Publika TV http://ru.publika.md/link_1057681.html | Oct 5, 2013 |
| Festivalul vinului e în toi! Licoarea lui Bachus, la mare căutare în piaţa marii adunări naţionale | Adevarul newspaper & online version http://adevarul.ro/moldova/actualitate/video-festivalul-vinului-e-toi-licoarea-bachus-mare-cautare-piata-marii-adunari-nationale-1_524fe473c7b855ff5600d890/index.html | Oct 5, 2013 |
| Politicienii au fost printre cei mai aşteptaţi oaspeţi în centrul oraşuluin de festivalul vinului | Prime TV http://www.prime.md/rom/news/politics/item2942/ | Oct 5, 2013 |
| Два дня одного вина | Kommersant.md http://www.kommersant.md/node/21218 | Oct 5, 2013 |
| Conducerea ţării, dar şi oaspeţii europeni au gustat din licoarea lui bahus şi s-au încins în horă în PMAN | Publika TV http://www.publika.md/conducerea-tarii--dar-si-oaspetii-europeni-au-gustat-din-licoarea-lui-bahus-si-s-au-incins-in-hora-in-pman-video_1618651.html | Oct 5, 2013 |
| Vinul moldovenesc i-a lăsat fără cuvinte pe turiştii străini. "aveţi cele mai bune vinuri din lume" | Publika TV http://www.publika.md/video-vinul-moldovenesc-i-a-lasat-fara-cuvinte-pe-turistii-straini--aveti-cele-mai-bune-vinuri-din-lume_1618911.html | Oct 5, 2013 |
| Si strainii s-au distrat pe cinste de ziua vinului: aveti o reputatie buna in europa si in turcia | ProTV http://protv.md/stiri/social/si-strainii-s-au-distrat-pe-cinste-la-ziua-vinului-aveti-reputatie.html?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+ProTv-ToateStirile+%28Pro+Tv+-+Toate+Stirile%29 | Oct 5, 2013 |
| Ziua naţională a vinului, la Chişinău | Moldova.org http://economie.moldova.org/news/ziua-nationala-a-vinului-la-chisinau-239339-rom.html?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+moldova%2Feconomie%2From+%28Economie+Moldova.org+%28Rom%C3%A2n%C4%83%29%29 | Oct 5, 2013 |
| Fotoreportaj ziua națională a vinului | Zdg.md http://www.zdg.md/stiri/foto-ziua-nationala-a-vinului-editia-2013 | Oct 5, 2013 |
| Oficialii au sărbătorit ziua naţională a vinului | Moldova.org http://economie.moldova.org/news/oficialii-au-sarbatorit-ziua-nationala-a-vinului-239340-rom.html?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+moldova%2Feconomie%2From+%28Economie+Moldova.org+%28Rom%C3%A2n%C4%83%29%29 | Oct 5, 2013 |
| Ziua vinului, sărbătorită la Chișinău! | Jurnal.md http://www.jurnal.md/ro/news/ziua-vinului-sarbatorita-la-chi-inau-1157651/ | Oct 5, 2013 |
| Chişinăul a devenit a 12-a oară un regat al lui Bahus | Prime TV http://www.prime.md/rom/news/social/item2943/ | Oct 5, 2013 |
| Ziua Vinului | Moldova 1<br>Programul de știri mesager (min 1 – 7)<br>http://trm.md/ro/mesager/mesager-din-5-octombrie-2013/ | Oct 5, 2013 |
| Start oficial pentru ziua vinului 2013 | UNIMEDIA http://unimedia.info/stiri/video-Start-oficial-pentru-Ziua-Vinului-2013-66506.html | Oct 5, 2013 |
| De ziua vinului oficialii au îndemnat invitaţii să guste din băutură, dar cu măsură | Agenția de presă Info-prim Neo http://www.ipn.md/ro/societate/57371 | Oct 5, 2013 |

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| Ziua vinului sărbătorită cu bucate alese și vin de calitate | Politik.md<br>http://www.politik.md/?view=articlefull&viewarticle=21120 | Oct 5, 2013 |
| Centrul capitalei, transformat într-un adevărat ring de dans. sute de moldoveni au încins atmosfera | Publika TV<br>http://www.publika.md/centrul-capitalei--transformat-intr-un-adevarat-ring-de-dans--sute-de-moldoveni-au-incins-atmosfera-video_1619231.html | Oct 6, 2013 |
| Ziua vinului, urmata de noaptea marii betii. cum au chefuit moldovenii si cat gunoi au lasat | ProTV<br>http://protv.md/stiri/social/ziua-vinului-urmata-de-noaptea-marii-betii-cum-au-chefuit-moldovenii.html?utm_source=feedburner&utm_medium=feed&utm_campaign=Feed%3A+ProTv-ToateStirile+%28Pro+Tv+-+Toate+Stirile%29 | Oct 6, 2013 |
| Au sărbătorit vinul în paşi de dans | Jurnal TV<br>http://www.jurnaltv.md/ro/news/au-sarbatorit-vinul-in-pasi-de-dans-7957354/ | Oct 6, 2013 |
| Demnitarii la cratiţă, de ziua vinului. ministrul agriculturii vasile bumacov găteşte friptură în centrul chişinăului | Adevarul.md<br>http://adevarul.ro/moldova/actualitate/vasile-bumacov-chisinau-1_52514720c7b855ff5606397f/index.html | Oct 6, 2013 |
| Unii oficiali, în rol de bucătari, de ziua vinului | Teleradio Moldova<br>http://trm.md/ro/social/unii-oficiali-in-rol-de-bucatari-de-ziua-vinului/ | Oct 6, 2013 |
| Turnaţi vin şi daţi tocană | Jurnal TV<br>http://www.jurnaltv.md/ro/news/turnati-vin-si-dati-tocana-7957361/ | Oct 6, 2013 |
| Cel mai bun oenolog, desemnat în cadrul zilei vinului | Moldova 1<br>Link: http://trm.md/ro/social/cel-mai-bun-oenolog-desemnat-in-cadrul-zilei-vinului-lkj/<br>Link: http://trm.md/ro/mesager/mesager-din-6-octombrie-2013km/ (min 1 - 5) | Oct 6, 2013 |
| Licoarea lui Bachus a curs fără măsură în acest week-end | Prime TV<br>http://www.prime.md/rom/news/social/item2928/ | Oct 6, 2013 |
| De ziua lor, vinficatorii au sărbătorit cu gândul la embargo | TV7<br>http://tv7.md/ro/news/de-ziua-lor-vinficatorii-au-sarbatorit-cu-gandul-la-embargo-28081.html | Oct 7, 2013 |
| Distracţie mare de ziua naţională a vinului: ritmurile moderne au adunat în pman oameni de toate vârstele | Publika TV<br>http://www.publika.md/distractie-mare-de-ziua-nationala-a-vinului--ritmurile-moderne-au-adunat-in-pman-oameni-de-toate-varstele-video_1620581.html | Oct 7, 2013 |
| Национальный День Вина завершился песнями, танцами и фейерверком | Publika TV<br>http://ru.publika.md/link_1059411.html | Oct 7, 2013 |
| Ziua Vinului: cel puţin 5000 de turişti | Jurnal TV<br>http://www.jurnaltv.md/ro/news/ziua-vinului-cel-putin-5000-de-turisti-7959684/ | Oct 7, 2013 |
| Праздник с эмбарго на глазах | Kommersant.md<br>http://kommersant.md/node/21228 | Oct 7, 2013 |
| Ziua Vinului sărbătorită cu mare fast la Chişinău | EVZ.md<br>http://www.evz.md/ziua-vinului-sarbatorita-cu-mare-fast-la-chisinau/ | |
| На Центральной Площади Кишинева отметили национальный день вина | MirTV.md<br>http://mirtv.md/libview.php?l=ru&idc=30&id=5931&t=/obsectvo/na-tentralinoi-plosadi-kisineva-otmetili-nationalinii-deni-vina | Oct 7, 2013 |
| ДЕНЬ ВИНА в МОЛДОВЕ | Pixanews.com<br>http://pixanews.com/photo-from-the-world/den-vina-v-moldove.html | Oct 7, 2013 |
| Vinul moldovenesc este mai gustos sub embargo rusesc | Ziarul Adevărul<br>http://adevarul.ro/moldova/actualitate/vinul-moldovenesc-mai-gustos-embargo-rusesc-1_5252430dc7b855ff560abc45/index.html | Oct 7, 2013 |
| ~~Выжить~~ выпить любой ценой | Allfun.md<br>http://allfun.md/article/22492 | Oct 7, 2013 |
| Fotoreportaj Ziua Națională a Vinului | Locals.md<br>http://locals.md/2013/fotoreportazh-den-vina-2013/ | Oct 7, 2013 |
| Peste 100 mii de vizitatori au participat la ziua naţională a vinului | Agenția de presă MOLDPRES<br>www.moldpres.md | Oct 8, 2013 |

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|---|---|---|
| De Ziua Naţională a Vinului, producătorii din moldova au avut vânzări de până la patru ori mai mari decât la ediţia din anul trecut, potrivit organizatorilor | Publika TV http://www.publika.md/ziua-vinului-a-adus-profit-pentru-producatori--au-avut-vanzari-de-patru-ori-mai-mari-decat-anul-trecut_1622881.html | Oct 8, 2013 |
| 80 mii sticle de vin au fost vândute în cadrul zilei naționale a vinului | TIMPUL.md http://timpul.md/articol/galerie-foto-80-mii-sticle-de-vin-au-fost-vandute-in-cadrul-zilei-naionale-a-vinului-49512.html | Oct 8, 2013 |
| Peste 40 mii de persoane au vizitat moldova de ziua vinului | Teleradio Moldova http://trm.md/ro/social/peste-40-mii-de-persoane-au-vizitat-moldova-de-ziua-vinului/ | Oct 8, 2013 |
| ZIUA NAȚIONALĂ a Vinului în cifre: peste 100 mii de vizitatori în două zile | Unimedia http://unimedia.info/stiri/ziua-nationala-a-vinului-in-cifre-peste-100-mii-de-vizitatori-in-doua-zile-66628.html | Oct 8, 2013 |
| Ziua Națională a Vinului-2013: un eveniment promotor al consumului corect de vin | AllMoldova.md http://www.allmoldova.com/ro/viniculture/articles/233.html | Oct 8, 2013 |
| ZIUA NAŢIONALĂ a VINULUI, promotor a vinului şi a culturii consumului | Ziarul ECOnomist http://eco.md/index.php?option=com_content&view=article&id=9840:ziua-naional-a-vinului-promotor-a-vinului-i-a-culturii-consumului&catid=105:marketing-pr&Itemid=476 | Oct 9, 2013 |
| Молдавский Национальный день вина 2013: Наука правильного потребления | Aktiz magazine & online version http://az-ua.com/news/wine/27472.html | Oct 9, 2013 |
| Wine Day | Logos Press newspaper & online version | Oct 11, 2013, #37 |
| **Other project activities** | | |
| Success story of Moldovan brands | Capital Market: _**Oct 2_13_#37 (508** | Oct 2, 2013 |
| "Wine at the end of the tunnels in Moldova" by Leif Pettersen | SF Gate (USA) http://www.sfgate.com/travel/article/Wine-at-the-end-of-the-tunnels-in-Moldova-4869537.php#photo-5235941 | Oct 4, 2013 updated 4:34 pm, Friday |
| Între-o crîșmă și un bar, bea din vinul cel cu har... | Europa Libera: http://www.europalibera.org/content/article/25127355.html | Oct 7 |
| Moldova şi Armenia, în dialog privind colaborarea în domeniul IT | MTIC website http://mtic.gov.md/news_rom/168226/ | Oct 8, 2013 |
| | | |
| Moldova and Armenia hold dialogue on IT cooperation | INFOTAG "DAILY NEWS BULLETIN" 16:42 | Oct 11, 2013 |
| Sommelieri din Europa recomandă vinurile moldoveneşti pentru export | Modlpres news agency http://moldpres.md/News.aspx?NewsCod=9984&NewsDate=23.10.2013 | Oct 23, 2013 |
| СОМЕЛЬЕ из Европы провели дегустацию вин Cricova Chateau Vartely | Infotag news flow:18:34 | Oct 24, 2013 |
| Fiti eleganta in creatii autohtone | Jurnal TV http://www.jurnaltv.md/ro/news/fiti-eleganta-in-creatii-autohtone-7955878/# | Oct 1, 2013 |
| **Din inima campaign** | | |
| Vasconi prezinta o noua colectie de toamna! Ce costume sportive iti propune | Perfecte.md & video http://perfecte.md/article/shopping/vasconi-bucura-cu-o-noua-colectie-de-toamna-ce-noutati-vestimentare---155926.html | Oct 2, 2013 |
| Incepe toamna cu Vasconi! Ce colectie noua iti propune | Pro Tv: Acasa TV.md : Tv & video, online http://acasatv.md/o-seara-perfecta/incepe-toamna-cu-vasconi-ce-colectie-noua-iti-propun-video.html | Oct 2, 2013 |
| Incaltaminte naturala si culori indraznete. Ce-ti propune brandul Zorile pentru sezonul rece | Pro Tv: Acasa TV.md : Tv & video, online http://acasatv.md/o-seara-perfecta/incaltaminte-naturala-si-culori-indraznete-ce-ti-propune-brandul.html | Oct 4, 2013 |
| Incaltaminte din piele naturala si culori indraznete. Ce-ti propune brandul Zorile | Perfecte.md & video http://perfecte.md/article/shopping/incaltaminte-din-piele-naturala-si-culori-indraznete-ce-ti-propune---157311.html | Oct 4, 2013 |

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| Все свое ношу с собой: Выбираем сумку с Николетой Гаврилицэ и Еленой Карафизи | Allfun.md/In Fashion rubric http://allfun.md/article/22448 | Oct 4, 2013 |
| Cele mai tari paltoane made in Moldova | Jurnal TV: Desteptarea: http://jurnaltv.md/ro/news/cele-mai-tari-paltoane-made-in-moldova-7957282/# | Oct 6, 2013 |
| Ţinute de birou, made in Moldova | Jurnal TV http://jurnaltv.md/ro/news/-inute-de-birou-made-in-moldova-7959946/# | Oct 8, 2013 |
| Copilul tau va fi fericit! Ce surprize iti aduce noua colectie toamna-iarna a brandului Creme Brulee | Pro Tv: Acasa TV.md : Tv & video, online http://acasatv.md/o-seara-perfecta/copilul-tau-va-fi-fericit-ce-surprize-iti-ofera-noua-colectie.html | Oct 9, 2013 |
| Bombonici pentru cei mai stilaţi şi dulci copii | Allfun Facebook https://www.facebook.com/photo.php?fbid=10153318106300453&set=a.10150152523255453.409434.307885440452&type=1&theater | Oct 9, 2013 |
| Imbraca-ti copiii cu gust! Admira noua colectie de la Creme Brulee facuta pentru pici | Perfecte.md & video http://perfecte.md/article/fashion/imbraca-ti-copiii-cu-gust-admira-noua-colectie-de-la-creme-brulee---162341.html | Oct 9, 2013 |
| Bombonici pentru cei mai stilaţi şi dulci copii | Allfun.md/In Fashion rubric http://www.allfun.md/article/22599 | Oct 9, 2013 |
| Brio iti face toamna mai colorata! Ce colectie iti propune brandul autohton | Perfecte.md & video http://perfecte.md/article/fashion/brio-iti-face-toamna-mai-colorata-ce-colectie-iti-propune-brandul-1---167051.html | Oct 12, 2013 |
| Brio iti face toamna mai colorata! Ce colectie iti propune brandul autohton | Pro Tv: Acasa TV.md : Tv & video, online http://acasatv.md/o-seara-perfecta/brio-iti-face-toamna-mai-colorata-ce-colectie-iti-propune-brandul.html | Oct 12, 2013 |
| Adrian Ursu stie ce e mai bun pentru fetita sa! Ce a ales pentru Maria-Andreea de la brandul Ponti | Pro Tv: Acasa TV.md : Tv & video, online http://acasatv.md/o-seara-perfecta/adrian-ursu-stie-ce-e-mai-bun-pentru-fetita-sa-ce-a-ales-pentru.html | Oct 15, 2013 |
| Haine pentru baietei | http://jurnaltv.md/ro/news/tinute-made-in-md-pentru-baietei-7963831/# | Oct 15, 2013 |
| Adrian Ursu stie ce sa-i aleaga fiicei sale! Ce i-a luat Mariei-Andreea de la brandul Ponti | Perfecte.md & video http://perfecte.md/article/fashion/adrian-ursu-stie-ce-sa-i-aleaga-fiicei-sale-ce-i-a-luat-mariei---173191.html | Oct 15, 2013 |
| Дети тоже модники! | Allfun.md/In Fashion rubric http://www.allfun.md/article/22752 | Oct 16, 2013 |
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