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

Quarterly Report

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Quarterly Report

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ACRONYM LIST

AGEPI	State Agency on Intellectual Property of the Republic of Moldova
ANTRIM	National Association of the Domestic and Inbound Tourism
APEVM	Association of Producers and Exporters of the Moldovan Wine Industry
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
ATDI	Adventure Travel Development Index
B2B	Business-to-Business
B2C	Business-to-Consumer
BCR	Business Climate Reform
BSP	Business Service Provider
C&M	Cut and Make
CCENT	Cisco Certified Entry Networking Technician
CCI	Chamber of Commerce and Industry of Moldova
CEED II	Competitiveness Enhancement and Enterprise Development II
CIS	Commonwealth of Independent States
CFBC	College of Finance and Banking Chisinau
CMT	Cut, Make and Trim
CNC	Computer Numerical Control
CNVCPA	National Center of Alcoholic Beverages Testing - NCABT
CNVVC	National College of Viticulture and Winemaking in Chisinau
COP	Chief of Party
COR	Contracting Officer's Representative
CTICE	Center for Information Technology in Education
DCA	Development Credit Authority
DCOP	Deputy Chief of Party
EIB	European Investment Bank
ER	Expected Result
EU	European Union
FLL	First Lego League
FOB	Full Own Brand
FTA	Free Trade Agreement
FVV	National Fund for Vine and Wine
GI	Geographical Indications
GIZ	German Agency for International Cooperation or (GIZ)
GOM	Government of Moldova
HORECA	Hotel/restaurant/cafe
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
MCP	Marketing Coaching Program
MEP	Moldova Export Platform
MIEPO	Moldovan Investment and Export Promotion Organization
MICE	Meetings, incentives, conferences, and exhibitions
MIS	Management Information System
MIS	Managment Information System
MICT	Ministry of Information, Communications, and Technology
MOU	Memorandum of Understanding
MWG	Moldovan Wine Guild
NTA	Moldovan National Tourism Agency
NetAcad	Cisco Networking Academy

NWD	National Wine Day
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
QLab	European Software Institute Eastern Europe Quality Laboratory
RIA	Regulatory Impact Assesment
R&D	Research and Development
RCI	USAID Regional Competitiveness Initiative
SCJ	Supreme Court of Justice
SEE	South East Europe
SEED	Sector, Engagement, Enhancement, and Development Fund
SIDA	Swedish International Development Cooperation Agency
SME	Small and Medium Enterprises
SWM	Startup Weekend Moldova
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
TUM	Technical University of Moldova
WCB	Wine Country Brand
WoM	Wine of Moldova

EXECUTIVE SUMMARY

Chemonics International Inc. (Chemonics) and Dexis Consulting Group (Dexis) are pleased to submit to the United States Agency for International Development in Moldova (USAID/Moldova) this Quarterly Report for the Competitiveness Enhancement and Enterprise Development (CEED) II project. This quarterly report covers the three-month period from January 1 through March 31, 2015. Below is a summary of the highlights that occurred during the reporting period.

Fashion Industry

- A new the 2015 **spring promotion campaign “Din inima, branduri de Moldova”** was launched with support from CEED II project. 38 Moldovan brands have been included promoted on the domestic market, increasing brand awareness and impacting on the notoriety of the products made in Moldova. In result, consumers’ interest towards the new collections grew, showing increased number of followers of the Din inima Facebook page (from 8500 in July 2014 to more than 12,000 in March 2015).
- With CEED II support, 7 apparel and fashion accessories’ companies have **developed new brands and corporate identity brandbooks**. These companies are thus becoming more competitive and more attractive for consumers, but also to their business partners. Since the beginning of the CEED II project, a total number of 43 apparel and fashion accessories companies have been assisted by CEED II in branding and rebranding activities. These companies the new generation producers of fashion industry.
- The collections of 2 own brand Apparel Companies, Allert&Co and Mobile, were highly appreciated at CATEXPO International Fashion Exhibition in Kazakhstan where these companies participated for the first time with CEED II support. Following the trade fair, the international company BESSINI TEXTIL visited the Moldovan producers and assessed opportunities for a potential future cooperation in design and manufacturing. It also selected several items from the fall/winter collection of the Moldovan companies for trial orders.

Information Technology Industry

- The **1st Robotics competition - FIRST LEGO League Moldova** - was organized with the support of CEED II and other partners, according to the international format and rules. Thus, Moldova was included in the list of around 100 countries organizing FLL competitions, and our teams competed alongside with other 300 thousand children around the world. Around 60 children, representing 10 teams from 6 institutions, joined the FLL Moldova event. The champion of the competition was invited to participate at FLL Estonia finals and to compete among the 33 teams, representing 5 countries: Estonia, Latvia, Lithuania, Norway, and Moldova. The Moldovan team was awarded the 1st place for the Robot Design section, as they impressed the jury with the engineering concepts applied in the construction of the robot. As a result, the **public interest for the Robotics initiative grew extensively**; there are new participants interested to join the Roboclubs. The Ministry of Education is willing to get more actively involved in the expansion of the Robotics initiative and to ensure the continuity of the FLL Moldova competition, with state budget funding.
- CEED II continued to assist the **preparation phase of the 1st Center of Excellence in IT**. The draft Business Plan was developed and presented within a close meeting, at USAID premises, attended by representatives of the project stakeholders. CEED II hired a design firm, which delivered the proposed **floor-plan with the recommended changes in the layout**, as well as division of the space into layers, to gain additional surface, but also to improve the energy efficiency of the facility. Later on, the design firm started working on the visual design concept, which will be inter-connected with the branding of the Center.

- As part of the continuous efforts of CEED II to **build the startup community and promote the entrepreneurial culture**, two events were organized by CEED II and hosted by the 1st co-working space Generator hub: (i) a follow-up event with Startup Weekend Moldova participants, with a guest speaker from Bulgaria (, who is also a partner in a new European investment fund), and (ii) meeting with a potential investor from Bulgaria. The best practices in fundraising were covered during the events, as well as the opportunities open for Moldovan startups and some hints on what the investors are looking for.
- The new **IDC Competitiveness research on Moldovan IT Services Industry** was publically presented within an open session of the Ministry of ICT. The research provides the managers of IT companies and the potential investors with a tool for decision-making, while planning for the creation or development of IT service centers in Moldova.
- In order to **build the capacity of ATIC** and help it provide value for its members, CEED II offered support in the following initiatives: **updating the Legal Pocket Guide, promoting the B2B portal, and developing a catalogue of ICT companies.**

Tourism Industry

- **CEED II continued to support strengthening of the ANTRIM capacity and to organize a number of promotional activities.** Two new companies became members of the association and other five are looking to join ANTRIM in the nearest future. The association successfully organized its general assembly electing a new Chairman and Deputy Chairman. With CEED II support, ANTRIM organized a B2B promotion event in Bucharest and established new partnerships with Romanian tourism sector stakeholders. ANTRIM organized a social media marketing workshop on best practices in using SMM in tourism. Additionally, the association collaborated with the US Forest Service and organized a study visit in Moldova for its experts, helping to establish partnerships between Moldsilva and the American partners.
- With CEED II support, **Moldovaholiday.travel** started a series of improvements implementing the **French and German languages**, which will make the site more comprehensive and more accessible for visitors from target markets. Also, the website started featuring the new tourism country brand- the Tree of Life.
- **Ongoing digital promotional campaign for moldovaholiday.travel & the National Tourism Brand.** In order to increase visibility of moldovaholiday.travel website on AdWords and that of the National Tourism brand on social media, CEED II engaged a specialized company, to develop a digital strategy, and to assist at its implementation. The social media campaign started on February 18 showing a great impact on the number of people reached and the visibility. Since the beginning of the campaign, over 345,000 people found out interesting things about Moldova's traditions, culture, wines, monasteries and many other tourism attractions they probably didn't know about.
- **Moldova Holiday mobile application launched.** The newly developed application features Top 50 tourism attractions from Moldova, representing the major wineries, cultural and architectural monuments, museums, and monasteries in Moldova.
- **CEED II supported the participation of Moldovan tourism agencies at Vakantieubeurs in Utrecht.** On January 13-18, 2015 Moldovan companies Solei-Turism and Amadeus Travel Lufthansa City Center participated with a stand at the Vakantieubeurs International Tourism exhibition in Utrecht, in the Netherlands. This was the first exhibition featuring the new tourism country brand- The Tree of Life. Two journalists from Netherlands and one from Belgium will participate at the familiarization tour organized by CEED II in April 2015.
- **CEED II supported the participation of Moldovan tourism agencies at Ferrien Messe in Vienna.** On January 15-18, 2015, 6 Moldovan companies and the National Tourism Agency participated with a common booth at the Ferrien Messe International Tourism exhibition in Vienna, Austria. Sissi Munz, who is correspondent at the Touristica International publication, will participate in the familiarization tour organized by CEED II in April 2015.

- **CEED II supported the participation of Moldovan tourism agencies at ITB Berlin Exhibition and organized an international press conference.** On March 4- 8, 2015, 7 Moldovan companies along with NTA, participated with a common stand at the ITB Tourism Trade Show in Berlin, Germany. On March 4, CEED II supported the organization of a press conference, presenting internationally the new tourism country brand, the “Tree of Life”. 25 travel journalists and writers from German media, were introduced to the most popular tourist attractions, including wineries, many Orthodox monasteries, medieval cities, rural life, culture and got acknowledged with the country brand "Tree of Life".
- **CEED II continued its support to the National Tourism Agency in terms of rebranding,** positioning, marketing and promotion. The ‘Tree of Life’ brand book was finalized and adapted it for Romanian, Russian, and English languages. The agency held a workshop for the NTA explaining them the rules of use national tourism brand utilization. **The marketing and promotion plan was finalized according to the new tourism country brand program** initiated by CEED II. Along with the marketing expert, 3 meetings took place with NTA to discuss the Plan and make sure the main counterpart is included in the elaboration process.
- **Souvenir shop strategy developed and first souvenir product line was launched.** On March 19, together with NTA and ANTRIM, CEED II organized the official launch of the first souvenir line, during a press conference. The same day, three Tucano cafes in Chisinau started to sell branded souvenirs and later Vasconi started to sell branded t-shirts and bags in three stores centrally located.
- **CEED II Public policy initiative for hotel VAT reduction.** CEED II supports NTA and the Hotel and Restaurant Association in the development of a public policy initiative to reduce the VAT for hotel services from 20% to 9%, and to supersede the current 5% perceived by local authorities by the 1 EUR local tax. To start this initiative, CEED II hired a local consultant.

Wine Industry

- CEED II project provided support to strengthen ONVV’s institutional capacities. **ONVV’s institutional business processes have been upgraded.** ONVV has completed and approved the staff job descriptions, in line with ONVV’s competencies provided by its statute and the law; has developed descriptions of each of the performance indicators; and received templates for the budget allocation plan, for operations’ management, as well as activity templates.
- With support from CEED II project, ONVV continued to implement **a professional PR&communication campaign**, with impact on the ONVV visibility. ONVV has launched 11 press releases and organized about 5 press events; about 85 press clippings, including TV, radio and written local media have been released on the local market.
- CEED II project provided assistance for the **development of an ONVV institutional communication strategy** and a subsequent toolkit for implementation. Within the ‘Preliminary assessment’, about 25 industry interviews have been organized and a SWOT analysis developed.
- CEED II initiated **the development of the ONVV ‘business& industry intelligence’ services** to be provided to the industry stakeholders. CEED II and EIB projects’ consultants initiated the development of the industry intelligence & macro-economic appraisal and the marketing intelligence products.
- The project **assisted ONVV in developing the final 2014 annual report on activities, as well as its new Activity Plan for 2015.** The ONVV Council for Coordination has approved the 2014 Annual Report and the 2015 Annual Work Plan, including the marketing plan and the winemaking & viticulture activity plan.
- ONVV, with CEED II support, organized **a round table for consultations with the public authorities and institutions, with the purpose of establishing a framework for collaboration** to ensure more efficient implementation of the Wine of Moldova program.

- CEED II project provided **support in upgrading ONVV’s lobby and advocacy role**. The following initiatives were promoted: amendments to the Regulation of Payments in Agriculture (pending approval), consensus on the controversial Technical Regulation on the wine industry organization (more details in activity no.4); proposed new normative documents for approval; ONVV integrated MAFI working groups on the CNVVC reform and the certification procedures.
- The CEED II consultant developed the **Technical Specifications on the IT solution for electronic keeping of the wine registries**. The project and ONVV met with the wine sector representatives and defined the main business processes managed by the wineries, while keeping the internal wine registries.
- A **new Wine of Moldova Vernissage was organized in Talin, Estonia** by ONVV. 17 wine and divin (brandy) producers participated under the wine country brand. CEED II contributed to the concept and event design.
- The **Wine of Moldova participated at ProWein exhibition in Dusseldorf (Germany)** on March 15-17, 2015. 30 Wine Producers, 300 Moldovan wine SKUs were presented. CEED II supported the participation to this grand event. 5 Master classes with a Master of Wine and a PR Campaign, as well as a business trip by Minister Sula to ProWein, were organized.
- CEED II project **contracted the publication of a four-page editorial on Moldovan wines** in one of the most reputed wine journals in the world – Decanter magazine.
- **Wine of Moldova has been integrated into the biggest fair ‘Made in Moldova’**, organized by the Moldovan Chamber of Commerce and Industry between January 28th, 2015 – February 1st, 2015, at Moldexpo. 20 local wineries exhibited their wines and sold them at special prices. 4 master classes of Wine School organized at the fair.
- CEED II project organized a complex program of activities called the **HORECA Wine Proficient Services’ Week**, on February 16 – 20, 2015. This program included several activity types, as follows: (i) the HoReCa wine services’ audit; (ii) the European certification of Moldovan sommeliers; (iii) the training of local sommeliers; (iv) accreditation of the Moldovan Sommelier School to the standards of the European Sommelier Association; and (v) the development and launch of the Wine Friendly Restaurant Program.
- CEED II project supported MAFI and ONVV to continue **the legal & regulatory reform** in the wine industry, including to (i) find consensus on the draft of the Technical Regulation on the wine industry organization; (ii) develop new normative acts intended to enforce the new Law on Vine and Wine; (iii) reform the product conformity procedures and the official control system; (iv) and implement the Concept on the Excellence Centre in Winemaking and Viticulture by the National College Viticulture and Winemaking of Chisinau (CNVVC Excellence Centre).
- CEED II has contracted a legal & regulatory consultant, Nicolae Botan, to Develop a **White Paper for ‘Re-thinking Controls over the Wine Products’: towards to a ‘Legal, Loyal and Fair’ Wine of Moldova’**.
- **The Marketing Coaching Program has been continued** and provided support to additional small & boutique wineries to launch new wine products, to penetrate the local market and enhance sales. Gogu winery and Unicorn, Asconi winery, Equinox and the Association of Small Wine Producers integrated the MCP.

Finance and 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. Three with the Comertbank, Prime Capital and Rural Finance Corporation management were organized with the participation of USAID DCA expert, James Borger. The meetings focused on discussing the current achievements in implementing DCA activity in the institutions and their proposals on improving the DCA utilization. Follow-up monitoring visits memo related to DCA

partners' proposals were submitted to USAID along with letters with proposals from financial organisations.

- **New initiatives to increase access to finance** were researched during the quarter. Meetings with USAID, EIB "Filiere du Vin" and Sida representatives were organised for a possible USAID-BEI-Sida collaboration on guarantee to help wine companies with insufficient collateral to access the EIB loans, using DCA mechanism. Currently, EIB should present this guarantee scheme pilot to our counterparts in EIB before a decision could be made.
- To discuss a possible future collaboration on DCA for municipal bond emission, an **introductory meeting with City Hall representatives was organised**. It was decided that the next meeting will have a larger format, including Mayor and Sida representatives, as during the discussions with USAID and CEED II, Sida showed its interest to collaborate on a joint activity aimed to support the Mayor's Office in issuing municipal bond guarantees for a certain project.

Communication

- **CEED II activities were regularly highlighted by the mass media:** 340 times in electronic media, 50 times on local and international TV channels, over 8 times in print media, and 5 times on the radio stations.
- **The development of success stories is in progress.** Maxi Kids success story was worked on and submitted to the USAID Mission for clearance. Video success story that highlights the project IT Essentials (ITE) initiative success has been finalized. The first person success stories on the support to small handmade jewellery producers (Anna Popov) and employment in Butuceni region are in progress.
- To highlight CEED II provided assistance to the Tourism and Furniture industries during, and main accomplishments in the industries as result of project support, 2 **infographics underlining the impact of USAID assistance** was realized (see on the pages 12-13).



Tourism Industry Roadmap to Competitiveness

Among fastest growing industries in the world
US\$ 1.4 trillion global exports in 2013

Key driver for socio-economic progress
2.5 million foreign visitors in Moldova in 2013

Wine, gastronomy, culture, rural and soft adventure - key differentiators that position Moldova as an authentic destination in the heart of Europe

USAID CEED II* key impact

	Built a cohesive country image and vision		Enhanced Moldova's international awareness and demand
	Improved travelers perceptions of Moldova as desirable and stable destination		Consolidated public and private sector collaboration



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

THE IMPACT OF



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Home Furnishings Industry

Roadmap to Competitiveness

Moldova furniture market valued at over **\$140M***

4,000+ employees & **400+** companies

Industry plays strong role for self-employment and micro companies

USAID CEED II**
key impact



Facilitated impactful joint marketing through first common shopping mall



Improved product quality through design, branding and marketing.



Boosted domestic market and sales



Raised industry cooperation

BUILT INNOVATIVE JOINT MARKETING

A one-stop shopping destination in Chisinau focused on Moldovan furniture, offering high quality affordable retail space for manufacturers, and impactful joint marketing



USAID leadership and support proved critical – from concept, store design, business model, to branding and promotion



USAID successfully pitched the idea to investors, resulting in **\$2M invested** by local furniture producer Iurie Bors



A **unique joint partnership** between the investor and business association for MOBIMALL management was facilitated



FIRST COMMON FURNITURE SHOPPING CENTER IN MOLDOVA

Open doors in **Aug 2013 / 15,000 m²**

20 furniture brands
3,000 furniture & home products

300+ visitors per day and growing

EXPANDED DOMESTIC MARKET PRESENCE

50+ furniture manufacturers were engaged in **trade growth** activities Premier Made in Moldova campaign **raised industry profile** and awareness about quality Moldovan furniture

Inspired by Mobimall success, producers opened **Cristan common shop** in Comrat, southern Moldova



5 producers



2,000 m²

Important consumer **events** were **upgraded**, driving up firm sales, with better designed stands, pricing policies and promotion

2012 National Furniture Exhibition



doubled visitors



lower rental price by 50% for exponents



UPM as co-organizer

First Moldovan Furniture Fair



35,000 \$ sales



12 exhibiting companies

RAISED INDUSTRY COOPERATION

The industry was assisted to set up its **first business association** – Union of Furniture Producers (UPM)

UPM became operational, built its value and institutional capacity



17 active members

REPRESENTING



70% of local furniture production

UPM participates in **industry promotion**, and management of Mobimall

ENHANCED FIRM-LEVEL COMPETITIVENESS & BUSINESS STRATEGIES

Domestic **sales** of assisted Moldovan brands increased by **\$5.9M** or **24%**, while **investments** by **\$2.1M** or **12%**, in 2014 versus 2013



\$5.9M sales



\$2.1M investments

The **design** of furniture collections was upgraded through international “flying” designers

The **branding** and corporate identity was raised to global standards

The market understanding was improved enabling manufacturers to **better compete**



13 firms assisted in design & branding



400+ trained professionals in merchandising & sales



Furniture Industry Market Research 2012

*CEED II and private sector estimates in 2011

**USAID Competitiveness Enhancement and Enterprise Development II (CEED II) Project developed during 2010-2015 the Apparel, Footwear & Accessories, ICT, Tourism Wine and Home Furnishings industries: enhancing quality, increasing trade and investment; and improving public-private dialogue for a better business environment.

SECTION I

Quarterly Technical Activities

Chemonics International Inc. (Chemonics) and Dexis Consulting Group (Dexis) are pleased to submit to the United States Agency for International Development in Moldova (USAID/Moldova) this Quarterly Report for the Competitiveness Enhancement and Enterprise Development (CEED) II project. This quarterly report covers the three-month period from January 1 through March 31, 2015.

Below, in Section I, we summarize our progress to-date by targeted industry, discussing project accomplishments, problems (if encountered) and solutions. We also list all deliverables submitted during the period. In Section II, we present key results and impacts and report progress against PMP targets. Section III contains a summary of our planned activities for the next quarter. Section IV contains a report on the level of effort (LOE) and project expenditures.

A. Project by Targeted Industry: Accomplishments, Schedules, and Problems

A1. Apparel, Footwear and Accessories Sector

Activity 1. Support own label enterprises in developing a corporate identity package

CEED II continued to assist the apparel companies to launch new brands or rebrand the existing ones, in order to help them become stronger, have better recognized brands on the market, which contributes to raising the loyalty of existing clients and attract new ones and increasing sales, leading to development and growth. This also helps companies promote their corporate identity, follow the trends, and meet clients' expectations as well as build up customer-oriented and demand-driven fashion products.

Shifting to higher value added through emergence of new brands. During the reporting quarter, CEED II assisted the beneficiary companies to create a new brand or to rebrand by providing a standard assistance package for (re)branding, which included identification of a new brand name and slogan, development of the corporate style and identity package (package design, product labels, image photos and a basic brochure). As a result, 7 new generation brands have emerged: 5 apparel companies (Portavita, Alina Bradu, Clasic Prim, Valeriu Brinza, Stanislav Garstea) and 2 jewelry companies (Natalia Maskvina and Marin'elle).

The business providers (Avalonix, Intelstart and "OVM Transcargo"), selected based on a tender organized by CEED II developed companies' brand books. Each brandbook includes the basic corporate style elements: logo, structure and geometry, logo basic and associated colors, background solutions, slogan, stationary corporate style, prints and photos, packaging style, ambient style. All assisted companies have already started to implement new corporate styles.

Table 1. New generation brands emerged with CEED II support

	<p>Natalia Maskvina is a new jewelry brand. CEED II co-financed the design of a corporate style, presented in a comprehensive brandbook, leaflet and lookbook. This new brand will help Natalia Moskвина get into the European market, which is a target market for the company.</p>
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	<p>Marin'elle is a new jewelry brand. CEED II co-financed the design of a corporate style, presented in a comprehensive brand book, leaflet, and lookbook. This new brand will help Marin'elle get into the European market, which is a target market for the company.</p>
	<p>Aimo (by Stanislav Garstea) is a new brand of knitwear for men, women and children of a wide range: underwear (pants, shorts, t-shirts, sport shirts, slippers, pajamas, night gowns, body, underpants), upper wear (track suits, sweatshirts, trousers, pullovers, waistcoats, skirts). The company was created in 2010 and started selling in Chisinau shops through its own retail chain (2 own shops), as well as in one common Din Inima shop.</p>
	<p>VID'OK (Portavita company) is a new brand of casual woven wear: dresses, blouses, skirts and denim clothes with own design, good manufacturing quality and mid-level price points. The factory provides manufacturing services to foreign clients. In order to achieve long-term competitiveness, the company launched its own brand in 2013 and started sales in Chisinau. After rebranding, the company intends to start exporting.</p>
	<p>Alina Bradu is an apparel brand producing romantic collections of blouses and dresses designed for young women. Its collection includes sketches of ornaments inspired from Romanian folk traditions and transposed on the clothes by hand or by the embroidery machine. In 2006, when they started, the idea behind this brand was to produce fashionable clothes with ethno style, offering a competitive price for a high manufacturing quality.</p>
	<p>Francesca (Clasic Prim company) is a new brand for fashionable children wear, targeting children aged 2-6 years. It is positioned in the medium price segment, using quality fabrics and elegant styles. Since summer 2010, the brand is available for sale in Causeni and intends to expand its sales to Chisinau, displaying their products in the Din Inima store.</p>
	<p>Picci (Valeriu Bribza IC) is a children's wear brand developed for a segment of kids from newborns up to 10 years old. It is sold on the local market, mainly through distributors.</p>

Increased awareness and brand promotion through websites. During January-March 2015, CEED II provided assistance to 5 apparel, footwear and accessories companies - Natalya Maskvina and Marinelle, to create websites, by contracting Creativ Maro IT Company.

Due to this activity, the assisted companies have built a stronger image and improved their market presence. The professionally developed websites enable targeting a wider market. They help companies gain credibility, enable them to keep customers informed about new product arrivals, upcoming events, special promotions, or any new services they offer, which improves and adds

Text box 1. Companies assisted to develop their websites

Lenicris - <http://lenicris.md/>
Hincu - <http://hincu.md/>
Shram - <http://shram.md/>
Natalia Maskvina - <http://natalyamaskvina.com/>
Marin'elle - <http://marinelle.boutique/>

value to customer service.



Figure 1. Hincu website developed with CEED II support.

Activity 2. Enhance of sales capacity on local market

Spring 2015 Din Inima promotion campaign. The promotion campaigns proved to be efficient tools in increasing sales capacities. During this quarter, CEED II assisted local fashion companies to promote their image through the organization of the Spring 2015 “Din inima, branduri de Moldova” promotion campaign. CEED II has involved APIUS in this campaign to ensure communication with company representatives, participating in all discussions and meetings. CEED II monitored and mediated the interaction between the companies participating in the campaign and the business providers employed – TV, media, marketing companies and others.

During January, CEED II collected offers to select marketing companies as well as other business providers to conduct the spring 2015 PR and promotion campaign for the companies participating in the Din Inima marketing campaign. On January 30, 2015 a meeting was organized with all participating companies in order to discuss the offers received and to decide on the activities to be implemented. During February, CEED II worked closely with APIUS to develop the concept for the Spring 2015 PR and promotion campaign for 36 apparel, footwear and accessories companies participating in the campaign.

The Spring Edition started in March and will last for 3 months. Building on the lessons learned, the promotion campaign entails a combination of outdoor advertising, internet promotion, PR through TV and other means, to create a positive perception of the Moldovan brands among local consumers.

- *Outdoor promotion.* In *Outdoor promotion.* In March, the first 20 billboards appeared, promoting 6 local brands - Ionel & Georghette, Tricon & MyRevival, Raquette & Bombonici, as a result of 2 photo sessions organised by Studio Salt. Other 5 business providers for billboards were selected by APIUS, being assisted by CEED II.
- *TV promotion.* In the framework this campaign, Acasa TV invited local brand representatives in to take part in the “O seara perfecta” (“A perfect Evening”) show, to discuss about new collections. The recorded shows are posted on acasa.tv and perfecte.md websites. The first five shows with the brands Nanetty, Brio, Lia Fia, Burlacu and Cristina/Seline have already been posted.
- *Online promotion.* The lookbooks for the new collections are developed by 2 business providers - Salt Studio and Green Fusion Agency. They are promoted on allfun website by Zingan.com. First Passer, Brio and Zorile brands are promoted. Facebook promotion on Din inima page is done by Green Fusion Agency.



Figure 2. Outdoor promotion of Maxikids brand on the frame of Spring 2015 promotion campaign Din Inima

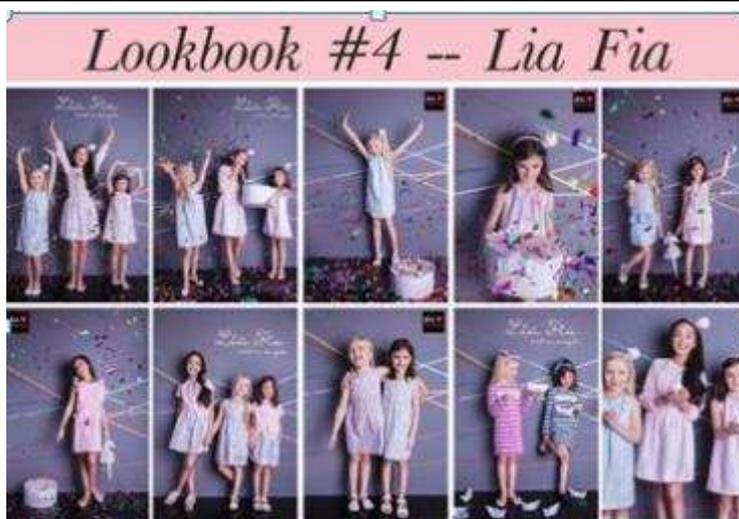


Figure 3. Lookbook Lia Fia developed for Din inima Spring 2015 campaign

The costs for the spring promotion campaign are shared between CEED II and the beneficiary companies (60%:40%), therefore, CEED II will spend around 300,000 MDL, while the companies will spend around 200,000 MDL.

Fashion show Din Inima Spring 2015. The fashion show Din Inima, Spring 2015 edition was held in a new format. As every year an increasing number of companies show their interest to participate, it was decided to organize a 2-day fashion show on March 14 and 15, during Fashion Weekend 2015. A total of 35 brands showcased their new spring collections at the Organ Hall of Chisinau. More than 150 personalities (officials, politicians, artists, singers, TV anchors and fashion bloggers) walked on the stage, presenting the collections of 35 local designers.

The event was organized by the Association of Light Industry of Moldova (APIUS) in partnership with the Association of Women Entrepreneurs of Moldova (AFAM) and supported by USAID CEED II, under the patronage of the First Lady, Margarita Timofti and the Ministry of Culture of Moldova, Monica Babuc. The event brought together collections of both well-known designers such as Eugen

Hudorjkov, Georgette, Sekana, Creme Brulee, Vistline and new designers such as Kheops, Folks, Etnopera, Ludmila Storojuc, Polina Hasanov, Olea by Divero, Le parole and others.

Repeated participation of fashion companies in the promotion campaigns and fashion shows contribute directly to the continuous improvement of their capacities for marketing and promotion. Therefore, after the fashion show, many companies (ex. DiVero, Alina Bradu) said they sold almost all the stock of products in just a few days as the demand has increased dramatically. Stylists and fashion bloggers have mentioned a higher quality of the collections presented this spring, compared to the first editions, which shows an improvement in the design skills and the presentation of collections, as well as enhanced workforce capacity.

A number of companies that had stores located in suburbs or near production facilities, have opened new stores in downtown (Maicom, Irka shoes, Oldcom, Tricon, Brio and others). Another positive results is the new positioning of products by launch of new brands such as Brio Exclusive for apparel and Seline (Cristina company's new brand for exclusive footwear).

Activity 3. Enhance export capacity through exhibiting in specialized international shows and matchmaking assistance

The participation of Moldovan companies in specialized shows is an efficient tool to attract new clients, enhance export and increase sales on new or existing markets. In January-March, CEED II assisted local apparel, footwear and accessories companies to participate in important tradeshows and events aimed to enhance companies' export capacities. CEED II helped with the logistics to organize the participation of companies at international exhibitions under common stands, also providing support during and after the events.

Bijorhca International Jewelry Exhibition. In January 23-26, 2015, CEED II helped 3 Moldovan fashion accessories manufacturers - Ju-Bijoux, Marinelle, and Natalya Maskvina to exhibit their handmade collections to EU buyers at the emblematic Bijorka 2015 tradeshow in Paris. The repeated participation is paying off for Ju-Bijoux, which has penetrated export markets due to its participation in Bijorka. Today Ju-Bijoux sells its fabric handcrafted jewelry in Finland, Japan, France, and Italy. Since their first exposure in 2013, the company doubled sales and employed five more women. All the participants collected contacts for future cooperation, as well as orders for delivery of products. In their first appearance at Bijorka, the other two designers impressed buyers and came back home with their first trial orders for exports. The designer of Ju-Bijoux, Ana Popova, returned from the trade show with 17 new orders. These success stories create a business pathway to be followed by dozens of other Moldovan designers. To motivate other local jewelry producers to participate at exhibitions, on February 20, handmade jewelry designers had an informal offline meeting to discuss the results of



Figure 4. Participation of Ju-Bijoux at Bijorka 2015 Exhibition (designer Ana Popova and her handmade collection)

participation at Bijorhca international jewelry exhibition in Paris in January 2015. Offline participants were interested in the results of the exhibition, the process of developing collections, and the trends in this field. Photos from the exhibition were shown, participants discussed about their impressions and about the possibility of future joint participation.

Leather & Shoes International Fair. During January 20-23, 2015 CEED II supported the participation of 5 footwear and accessories producers - Oldcom, Tiras, Floare, Tighina and Tesner at the Leather & Shoes international fair in Kiev, Ukraine. The main aim of this participation was to increase the presence of the participating companies and to keep the interest of the existing clients. At the same time, several companies managed to attract new clients: the handbag producer I. Tesner, selling the brand Maalex, acquired 5 new contacts, Tiras - 3 contacts with Ukrainian shoes retailers. Both companies are now in process of establishing cooperation liaisons with the new clients.

GDS– Global Destination for Shoes exhibition. For the first time, 7 footwear companies participated at GDS – Global Destination for Shoes specialized international exhibition. The event was held on February 4-6, 2015 in Dusseldorf, Germany, where shoes producers from around the world met to showcase their collections for the next Autumn/Winter 2015/16 season. With a newly developed concept, the current GDS exhibition gathered 160 exhibitors presenting 900 brands, and was appreciated by professionals as well on its way to become a leading trade show. The participating Moldovan companies - Cristina, Tiras, Floare, Tighina, Oldcom, Rotan, and Vitalie Burlacu showcased their products under a common booth and were assisted by Jordan Saliman, a Matchmaking expert from USA, contracted by CEED II.



Figure 5. Moldovan stand at the GDS– Global Destination for Shoes exhibition, February 4-6, 2015

Participation in this event contributed to promoting Moldova as a shoe manufacturing country. The event served as a platform for Moldovan manufacturers to present their capacities, to establish new partnerships and attract buyers in the footwear and accessories sector. Companies were proud to participate in a major show like this.

Two big opportunities resulted from companies' participation in GDS: (i) Alpina Shoe, a Romanian company manufacturing for ZARA and ALDO (which is looking to source over 90,000 pairs in a neighboring region) appreciated Cristina's offer

and decided to make a business trip to Moldova in March 2015 to establish collaboration with the Moldovan company and to visit other footwear manufacturers here; (ii) Deichmann Stores (a retail chain running thousands of stores) visited the Moldovan stand, looking for sourcing close to the market.

During the exhibition, companies gathered more than 40 new contacts and are currently working to establish partnerships with them. The Moldovan companies returned from the tradeshow very

enthusiastic. They highly appreciated the support provided by CEED II and intend to participate at the next GDS exhibition in summer 2015.

Zoom by Fatex international exhibition. During February 10-13, 7 apparel companies, Mobile, Ionel, Tricon, Odema, Steaua Reds, Velitextil Plus, and Saltoianca participated at Zoom by Fatex international exhibition in Paris, France. This edition of Zoom by Fatex was successful for the Moldovan companies in terms of establishing new contacts. Three companies, Ionel, Mobile and Odema started to prepare samples for foreign clients, based on which they would negotiate the future collaboration.

Textileprom exhibition. On February 20-24, 5 apparel companies, Infitextil, Intercentre Lux, Odema, Steaua Reds, and Saltoianca showcased their own brand collections at Textileprom exhibition in Moscow, Russia. Due to this participation, Steaua Reds secured a new contract for 2015 from one of its existing clients; Infitextil showed to their clients a new collection; Odema attracted a new client from Novgorod for school uniforms and is currently holding negotiations with it.

CJF-Child and Junior Fashion-2015 Spring Exhibition. On February 24-27, 2 children wear manufacturers, Emilita Lux and Velitextil Plus, participated at the CJF-Child and Junior Fashion-2015 Spring Exhibition in Moscow, Russia. Due to its permanent participation, Emilita Lux attracted a new client and started discussions with it regarding the assortment, quantity and price.

Palas Leather Show. In March 18-22, CEED II assisted Irka shoes footwear company to participate at Palas Leather Show exhibition in Iasi, Romania with its new spring collection.

International fashion exhibition Central Asia Fashion. In March, 15-18, 2015, CEED II assisted 8 own brand apparel companies, Mobile, Ionel, Steaua Reds, Premiers Dona, Velitextil Plus, Emilita Lux and Allert&Co, to participate for the first time at the International fashion exhibition Central Asia Fashion. This event is the only one in Central Asia which presents a professional platform for networking, was a unique opportunity for Moldovan companies to showcase their products and to demonstrate them to a professional audience of retailers.



Figure 6. Premiera Dona Director, Galina Gavrilenco, and Velitextil Plus Director, Veronica Pintelei, discussing with a potential client at the International fashion exhibition Central Asia Fashion, March 15-18, 2015

Intensive networking meetings for business audience, buyers, distributors, owners of the fashion boutiques, wholesale vendors were provided within the exhibition program. Business meetings ensured receipt of maximum practice from the experts of the fashion market.

Participation at this exhibition was successful for Moldovan own brand apparel companies. They established 49 new contacts (Mobile – 14, Alert&Co – 8, Velitextil Plus – 5, Steaua reds – 3, Ionel – 3, Emilita Lux – 5, Odema – 5, and Premiera Dona – 6 contacts). Importantly, the company Bissini Textil International visited the Moldovan stand and was impressed by the collection displayed by Allert&Co and Mobile companies, making arrangement to visit these companies in Moldova in April.

Activity 4. Enhance product design, construction and production capabilities of own-brand footwear and accessories companies

Improving product quality through design and pattern-making. For own brand companies, product design and pattern-making capabilities are very important to ensure high quality of products, thus contributing to sales growth. Therefore, this quarter, CEED II continued its cooperation with foreign designers to enable fashion industry companies improve their collections and manufacture more competitive products.

In January 12-17, 2015 the international consultant in pattern design and grading, Olesea Ionita, assisted the designers from 7 own brand children wear producers, Emilita Lux, Velitextil Plus, Lenicris, Maxikids, Svibmagtex, Vasile Moldovan, Clasic Prim, and 2 teachers from Technical University by delivering a Pattern Making Design Workshop. The trainer used interactive tools and real-life examples of best practices in pattern-making and grading. The following specific subjects were addressed during the training: modeling of children garments; grading for various child complexities (body constructions); grading rules for different sizes; removing the defects of fitting; making the master pattern for new born children garments; making the master pattern for children garments up to 12 years old. All companies implemented the learned technics for pattern making and improved the fitting.

In March 23-27, 2015, the international consultant Mariana Costea delivered a workshop on pattern design for 10 footwear company specialists and several teachers from the Technical University to improve their skills in pattern design.

During March 24- April 2, 2015, with CEED II support, the international designer Rimvydas Birstonas, evaluated the 2015 fall collections developed by 7 own brand apparel companies, Tricon, Artizana, Sram, Vistline, Maicom, Alina Bradu and Smelicva. In addition, the consultant helped companies' designers to start properly the planning process for the development of their Spring/Summer collections for the 2016 season. A group of 4 companies, Vistline, Sram, Alina Bradu and Smelicva were helped by the international consultant to improve their design process and collections. The consultant focused on the development of upcoming 2016 spring/summer collections, including the composition, choice of silhouettes, design elements and style, as well as fabrics and accessories in line with the current market position of the given company. He also discussed with the management such issues as correct implementation of design process, weaknesses within the company, and actions needed by the management to improve this process. This assistance will help companies develop better collections for the 2016 spring/summer season, which will result in better sales rates of new collections.

Diversifying textile, leather, and accessory suppliers. Product quality depends primarily on quality of the raw material. However, Moldova does not have own textiles or leather. To overcome this gap, CEED II supported Moldovan companies' visits to the largest textile tradeshow Premier Vision in France and to warehouses in Europe, for several years. As a result, Moldovan manufacturers found reliable suppliers, able to deliver small quantities for a proper price.

In February, a group of apparel designers and purchasing specialists from Moldovan apparel companies (Di Vero, Nanetty, Raquette, Secana, Tricon, Saltoianca, Emilita Lux, Alina Bradu, Sram, Sandy, Smeligva, Velitextil Plus, Artizana and Mobile) had the opportunity to connect with international raw material and accessories suppliers and to supplement their fabric stocks for the upcoming collections.



Figure 7. Moldovan designers from apparel companies visiting Premier Vision and Texworld raw materials international exhibitions in Paris, France, February 9-15, 2015

The apparel producers visited Premier Vision and Texworld raw materials' international exhibitions in Paris, France, during February 9-13, 2015, where they had access to the fabrics collections of 726 exhibitors from 35 countries.

The wide range of materials and prices matched the needs of the Moldovan apparel companies, having thus the chance to connect with the new worldwide fashion trends showcased during these two renowned trade fairs. As a result, the Moldovan producers have gained access to a valuable database of fabrics' and accessories' suppliers used for establishing new business partnerships for the apparel sector.

Following the French exhibitions, on February 15-20, 2015, a group of 8 Moldovan companies supported by CEED II and guided by the international designer Olesea Ionita, visited 11 Italian stock warehouses where they placed orders for fabrics worth about 20,000 Euros. This buying visit offered Moldovan producers access to high quality natural fabrics at reasonable prices for their new collections. The modern design and affordable cost of the raw material will ensure the competitiveness of their upcoming collections.

Text Box 2. Testimonial from Apparel Company on the assistance provided for visiting raw materials warehouse stocks

"We are really satisfied with the results of our visit to the raw material warehouse stocks in Italy, organized with the USAID CEED II project support. This was an excellent business opportunity for our company, as we purchased high quality fabrics at a price we can afford. Therefore, we will be able to launch a new and fashionable collection on the local market at a competitive price. We expect this collection to sell fast and to bring us new clients." —

*Nadejda Novitchi, owner & director,
Sandi Apparel Company*

Activity 5. Strengthening the institutional capacity of APIUS

During the quarter, the development of the White Book for the Fashion Industry continued. The document on the sector's current situation was transmitted to a local consultant, Andrei Crican, to develop the Industry Vision for the future, its growth potential, to identify the main competitiveness factors and key improvements required by the Government and Private sector regarding legal environment, fiscal and trade climate, and human capital as a critical factor for the industry development.

Additionally, the fashion business consultant from Peace Corps assisted APIUS to prepare a Project which was presented to the American Embassy and which resulted in the allocation of \$8,000 for the creation of a Textile Library in the CFTEA center. This is an example demonstrating increased leadership of APIUS and increased capacities to attract and manage funds.

Activity 6: Promote young talents through development of Acceleration Center for Fashion startup designers (Center for Fashion and Technology Education and Acceleration).

CEED II continued to work jointly with the Technical University of Moldova on the CFTEA creation. An Order regarding the start of the reconstruction works related to CFTEA creation was issued on February 4 by the UTM Rector. CEED II also worked closely with TUM regarding the environmental and human protection issues during the reconstruction and interior finishing works, such as work safety briefings; authorized personnel; appropriate PPE (hard hats, gloves, safety shoes); waste disposal; recycling; fire protection etc. A number of actions have been taken in this connection (e.g. emergency evacuation plans have been developed and displayed; the reconstruction working area has been isolated; restricted access of non-authorized people to the renovation site signs have been displayed; etc.). Site visits and ERC monitoring have been undertaken. This activity is under process. During this quarter, CEED II worked on the architecture and interior design of the Center. According to the acting laws and regulations, commissioning of the facility has to be done in accordance with its purpose and operational objectives, based on building plans, technical drawings of the systems and technological specifications for the execution of the works, developed by a licensed architectural/design company.

Since the space offered by TUM will be used as a venue for educational and practical activities, and therefore has to be adjusted in accordance with the design concept developed, CEED II subcontracted the Municipal Design Institute “Chisinauproiect” (architecture and design company) to make changes to the original building plans, technical drawings and technological specifications for the execution of construction works. This activity has been coordinated between Chisinauproiect, TUM and the designer. As a result, Chisinauproiect issued the plans and technical specifications (e.g. ventilation, electricity, water and heating etc.) which allowed TUM and CEED to start subcontracting service providers on the needed systems.



Figure 8. Construction works at CFTEA venue

CEED II coordinated with TUM the progress related to permissions from relevant authorities and organizations (such as Public Health Center within Ministry of Education, Architecture and Urbanism Department within Municipality, Fire and Rescue Department within Ministry of Internal Affairs and other relevant institutions) to start the reconstruction works and to be prepared for the later facility commissioning. This activity is under process.

In March, CEED II subcontracted the service provider for turnkey execution of the ventilation and air conditioning systems. CEED II also subcontracted the sound proofing of 4 training rooms, which was finalized in March. CEED II and TUM agreed to co-share the costs related to the installation of electricity, heating, water and sewerage systems. CEED II decided to purchase the needed goods and materials, while TUM subcontracted the service provider to undertake mounting works. In March, CEED II worked on subcontracting the service provider for interior doors, and had negotiations with service providers for vinyl floor covering; the wood furniture manufacturing; the installation of automatic fire alarm system, automation system for heating, ventilation and air conditioning; security system; access control system by card; video surveillance system; and sound connection system. CEED II continued to research on potential subcontractors, different technical solutions, materials, equipment, furniture, pricing etc. related to the future purchases for the Center endowment. This activity is underway.

CEED II, jointly with TUM and APIUS, worked on the development of the CFTEA name and Logo. It was decided that CFTEA, in addition to the long official name, should have a short creative name that will be catchier among the final beneficiaries: students and designers. A private company that previously collaborated with CEED II on brand development, SRL Imprint, decided to make a contribution to CFTEA's creation and agreed to



Figure 9. CFTEA short name

develop the visual identification of the Center pro bono. A working group consisting of representatives of TUM, APIUS and CEED was created. The working group came with different name proposals, 6 name versions were selected, after which a survey among APIUS members, TUM teachers and students, other partners and stakeholders was organized. Thus, the short name for CFTEA was selected to be ZIPhouse. SRL Imprint developed a brand book for ZIPhouse.

A2. Information Technology (IT) Industry Activities

Activity 1: Adapting ICT education to industry needs

CEED II vision for improving human capital capacity focuses on matching education to industry needs while strengthening the IT workforce through partnerships with high schools, colleges, universities, and the private sector to improve IT training and promote IT careers.

ITE. In response to the requests of the ITE teachers' community, CEED II purchased 10 additional Networking toolkits to be distributed to the institutions delivering the optional ITE courses in the 2014-2015 academic year. Previously, CEED II received positive feedback from teachers as these toolkits proved to be very useful for laboratory classes and allowed improving the practical skills of students. The institutions were selected on a merit-basis; thus, teachers who were proactive in enrolling students at this course could benefit. This is also an additional tool for motivating teachers to improve their methods and further promote the ITE course.

Informatics curriculum. In order to ensure the effective implementation of the new informatics curriculum in the pilot institutions, CEED II contracted 2 consultants, Anatol Gremalschi and Grigore Vasilache to develop it for results monitoring and to provide recommendations to the Ministry of Education on the expansion of the new curriculum in the entire educational system. CEED II held consultations with the experts and decided that the best way to proceed is to organize a series of surveys for the teachers and students, followed by a reunion of the teachers from the pilot institutions, getting them also involved in the development of the recommendation document. The experts started

working in the second half of March and will continue through May, so that the Ministry of Education can plan for the next academic year. The workshop with the teachers piloting the updated curriculum is scheduled to take place during the Moldova ICT Summit, on April 29-30, 2015, so that its results could be presented to a broader audience during the conference.

Robotics. CEED II continued to strengthen the pilot Robotics clubs and decided to support the 1st Robotics competition in Moldova. The project helped develop the Regulation for the competition, based on the FIRST LEGO League rules and obtained officially the right to use the name FLL Moldova for local competition, given that the Estonian partner Robotika is supervising the organization and the compliance with international competition rules and format. CEED II held meetings with the educational institutions, which expressed their interest to register teams for the competition, and developed the action plan.

FLL is an international competition in the field of technology and robotics, organized by US FIRST Foundation and LEGO for elementary and middle school students. The purpose of FLL is to raise the young people's interest in Science, Technology, Engineering and Science and help them develop valuable life skills: critical thinking, problem-solving, creativity, and self-confidence. The main goal of the competition is to increase the interest of youngsters in science, technology, math and engineering; and inspire them to choose a career in these fields.

The competition includes four main sections:

- *Core Values Session*, where students are interviewed by a panel of judges or participate in a teamwork exercise;
- *Robot Design*, where the students have to demonstrate that the robot they built is designed appropriately for the tasks given;
- *Research project* - the students must carry out a research project and give a short presentation to a panel of judges on the innovative problem-solving project they completed;
- *Robot Game* - it refers to designing and programming LEGO Mindstorms robots to complete a wide range of tasks

Six institutions joined the competition. As the format of the competitions requires, the teams are composed of 9-16 years old youngsters. CEED II purchased the special FLL challenge sets for preparations of the competing teams. The participating institutions ordered the special FLL tables, recruited the teams and the coaches started preparations. Around 60 children, representing 10 teams from 6 following institutions joined the event: ARTICO, Poly-Technical College from Chisinau, "Ion Creangă" high school, "Mircea Eliade" high school, "Mihai Grecu" high school, and "B. Z. Herzli" high school.

The FLL Moldova competition took place on March 7, 2015, hosted by the Center for Children and Youth ARTICO. It was organized by CEED II and ATIC, in close cooperation with NGO Robotika from Estonia and with the support of StarNet holding, under the patronage of the Ministry of



Figure 10. Members of Robo Junior team focused on the robot performance

Education. Thus, Moldova was included in the list of around 100 countries organizing FLL competitions and our teams competed alongside with other 300 thousands of children from around the world.



Figure 11. FLL participants at the award ceremony

The topic of the FLL competition changes yearly. This year the topic was “World class” (learning). As the format of the competition requires, a number of professionals from different fields, including education, were identified and invited in FLL Moldova jury. They represent such organizations as: USAID, Technical University of Moldova, Moldovan ICT Companies Association, East-Europe Foundation, e-Governance Center, Starnet, DNT Association, etc. The Estonian partners conducted a training session with the judges to ensure they understand the rules, format and objectives of the competition, as well as the core values to be promoted and encouraged.

The judges selected the following teams as winners of FLL Moldova:

- 1st place Project –CreaBot team from "Ion Creangă" high school
- 1st place Core Values / Teamwork –Fenix team from "Mircea Eliade" high school
- 1st place Robot Design –RoboJunior team from "Ion Creangă" high school
- 1st place Robot Game –RoboLords team from Poly-Technical College of Chisinau
- Champion FLL Moldova –RoboLords team from Poly-Technical College of Chisinau.

Distinguished guests were present at the award ceremony: His Excellency Mr. James D. Pettit, USA Ambassador to RM, Kent Larson, USAID Moldova Country Director, Igor Grosu, Vice-minister of Education, and representatives of sponsors and organizers.

The champion of the FLL Moldova competition was invited to join FLL Estonia finals and to compete among the 33 teams, representing 5 countries: Estonia, Latvia, Lithuania, Norway and Moldova.



Figure 12. Mr. James D. Pettit, US Ambassador, with the FLL Champion and Moldovan Team after the award ceremony at FLL Estonia

FLL Estonia took place on March 13-14, 2015. The Moldovan team was awarded the 1st place for Robot Design section, as they impressed the jury with the engineering concepts applied in the construction of the robot.

The FLL competition had wide media coverage. Over 30 news articles and video/photo reports from the event were published in 19 local media, of which 7 TV channels. Several participants and winners were invited to participate in the TV shows, to promote FLL and the Robotics initiative in general. Part of the event was live broadcasted by Privesc.eu. After the return of the Moldovan team from FLL Estonia finals, they were also interviewed by local media to promote their successes. As a result, the public interest for the Robotics initiative has increased significantly; there are new participants interested to join the Roboclubs. The Ministry of Education is willing to get more actively involved in the expansion of the Robotics initiative and to ensure the continuity of the FLL Moldova competition. For this purpose, the Ministry is securing budget funding to become available in the next academic year.

Later on, CEED II decided to support the Ministry of Education in developing a standard curriculum for the Robotics initiative, to become available for the teachers. A consultant, Anatol Gremalschi, was hired, as he was previously involved in developing the curriculum for Informatics, IT Essentials and other subjects, to coordinate the working group in the curriculum development process. The work will start in April 2015, in close cooperation with the specialists Ministry of Education.

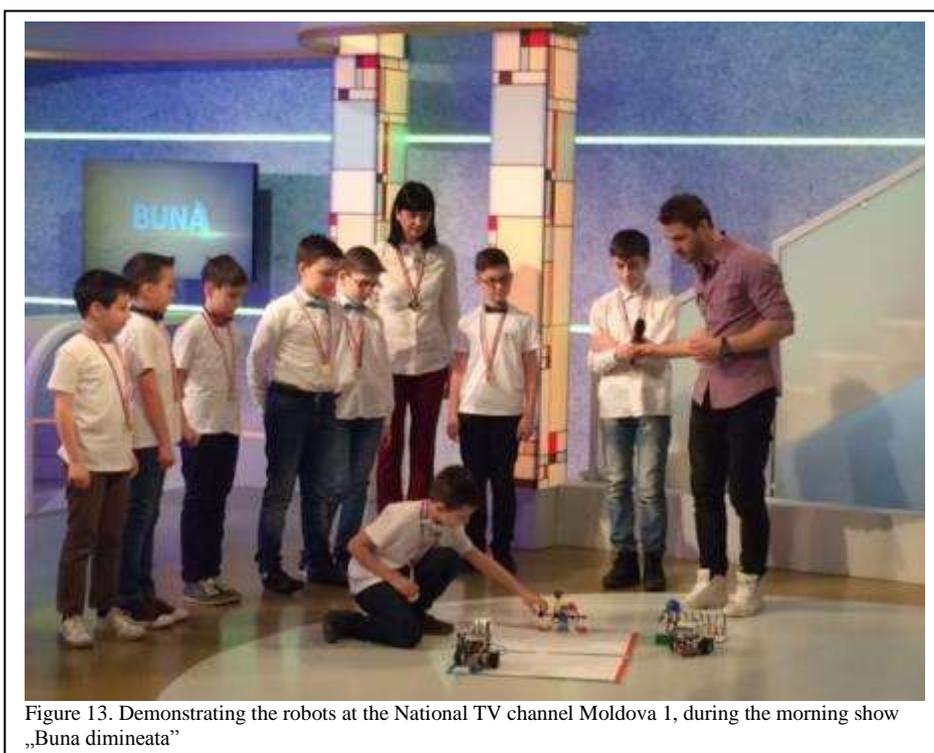


Figure 13. Demonstrating the robots at the National TV channel Moldova 1, during the morning show „Buna dimineata”

Activity 2: Design of the IT Excellence Center

CEED II actively supports and is involved in the creation of the International IT Centre of Excellence (ITCE) in Moldova. Contributing to filling the industry gap with education activities, the center will represent a combination of best educational practices and latest technologies aimed to help students, industry specialists and the population acquire the necessary IT skills and develop new ICT-driven products and ideas. The ITCE center will create a learning and entrepreneurial ecosystem for ICT industry development and further its competitiveness.

In the reported quarter, CEED II selected and contracted Arcodec Com company to develop the Design Concept for the Center, had them visit the location and started working in the beginning of February, in parallel with the CEED II international short-term consultant Maxim Gurvits, hired to develop the Strategic and Operational Plan. The consultant visited Moldova twice, in February. First time he had several meetings with the Center’s stakeholders -Microsoft, IBM, the Technical University, the private ICT companies (mostly ATIC members), the Ministries of Education and ICT,

the eGov Center representatives, the startup community members, and SIDA. During the second visit, Maxim Gurvits presented the draft Business Plan at a closed meeting at the USAID premises. Representatives of the project stakeholders were present at the event. Later on, Maxim Gurvits continued to work on a more detailed plan and budget, and provided a draft for partners to review. Consultations were continued with the potential partners for the Center, including Orange Moldova and SIDA. Both expressed their high interest in joining the initiative and CEED II and ATIC will continue negotiations regarding their further involvement in the project.

The design company had several meetings with project stakeholders, developed several proposals for the floor plan and the final version was approved. In addition to the floor plan, the company recommended some changes in the layout, as well as the division of space into layers, to gain additional surface, but also to improve the energy efficiency of the facility. Later on, they started working on the development of the visual design concept, as according to the Subcontract provisions.

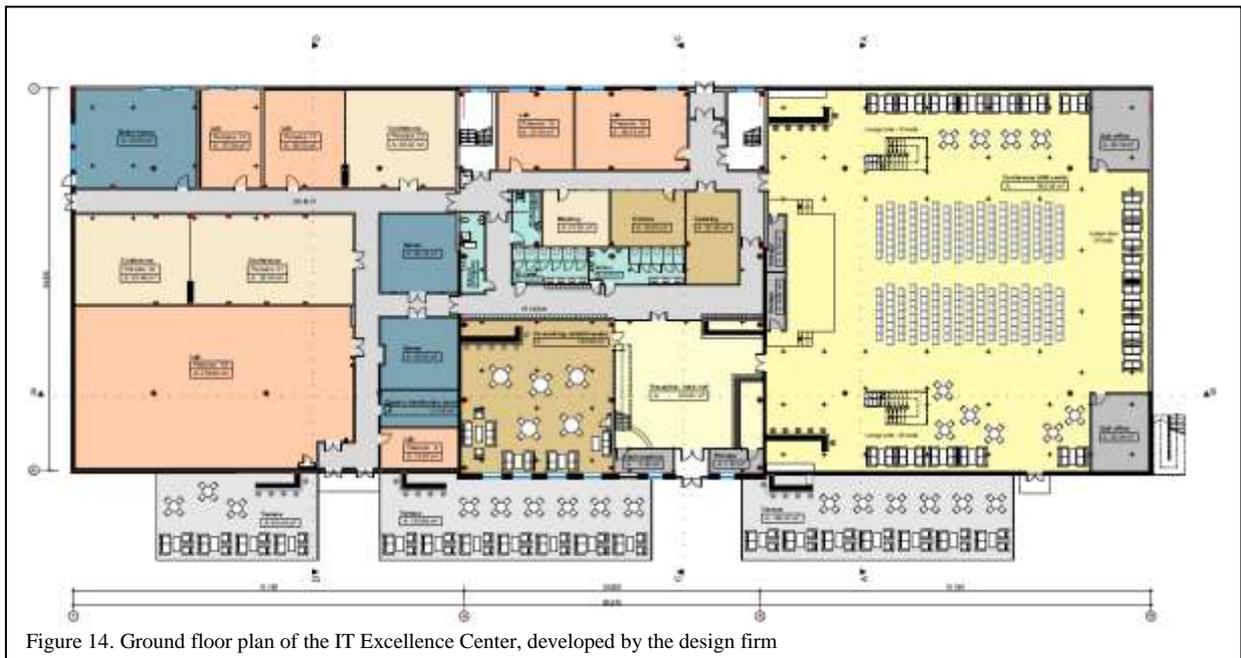


Figure 14. Ground floor plan of the IT Excellence Center, developed by the design firm

As envisaged by CEED II, another important element had to be connected at this stage – the branding of the Excellence Center. Thus, CEED II organized a competition to identify a company to develop the brand. Several offers were received and CEED II organized meetings with some of the bidders, together with the stakeholders, ATIC and TUM. As a result, a combination of two companies was selected to execute the work: Intelstart with the main responsibility to develop the naming and slogan, and Avalonix – mainly responsible for the visual identity. It is important that the branding and the visual design subcontractors are inter-connected as early as possible, to incorporate any specifics/elements of the branding philosophy in the interior design.

In addition, in order to help ATIC kick-start the Excellence Center project effectively, CEED II decided to hire a firm to provide legal services, define the organizational form, and develop the founding documents, internal regulations, contracts, etc. The company will be chosen via a competition process and will work during the months of April – May 2015.

Activity 3: Developing entrepreneurship culture in IT

CEED II organized the follow-up meeting with the attendees of the 6th edition of Startup Weekend Moldova. The meeting was organized on February 4, 2015, being hosted by Generator Hub, the 1st co-working space in Moldova. The three winning teams of Startup Weekend Moldova 6th edition presented their progress, plans and challenges. The guest speaker of the event was Maxim Gurvits,

entrepreneur, trainer and investor, currently based in Bulgaria. He presented to the attendees the IT Excellence Center project, and requested their feedback on the needs of the startup community, to be taken into consideration when developing the Center's plan. Afterwards, a questions and answers session was held, where the most popular topics were related to attracting investment and developing scalable startups. 47 people attended the event.

Later on, CEED II, in collaboration with the Bulgarian Investment Fund LAUNCHub and Microsoft Ventures, organized a special meetup with startupper and aspiring entrepreneurs on best practices on fundraising. The event took place at the Generator Hub on March 12, 2015 and had around 50 attendees. In addition, on March 13, 2015 LAUNCHub representative Rumen Iliev held one-to-one meetings with 8 startup teams, scouting for potentially investable startups. An event of this type, where a representative from a venture fund meets local startups was a premiere for Moldova. The feedback from Rumen Iliev was very positive; he indicated that he was surprised by the quality of the teams and ideas of Moldovan startups. Also, he mentioned he was going to follow-up with two teams, which he found interesting and potentially investable.



Figure 15. Rumen Iliev, partner of LAUNCHub (Bulgaria) investment fund speaking in front of young Moldovan startupper

Activity 4: Enhancing Competitiveness of the IT industry

New IDC research. The updated IDC research not only is a good promotional means for the Government, but is also providing a real instrument for the IT managers or potential investors, to use for decision making when planning the expansion of existing IT operations or investing in a new delivery unit.

After IDC revised and submitted a new version of the IT services research and it was accepted by the beneficiaries, CEED II, together with the Ministry of ICT started preparing for the presentation of the study's findings and recommendations. This presentation, initially scheduled for February 18, was re-scheduled and took place on March 10, 2015 at the Ministry of ICT. Around 20 people attended the event, which attracted great media attention; several TV channels and news agencies covered it in their news blocks. The research provides the managers of IT companies and the potential investors with a tool for decision-making when planning to establish or develop IT service centers in Moldova.

At the same time, IDC worked on the marketing White paper, according to the contract with GIZ. The revised version of the White Paper was submitted for final revision and approved at the end of March. The document was published on the Ministry of ICT website. CEED II committed to print it and

provide copies to the partners, to be used for promotion purposes, including for distribution to the Moldovan Embassies abroad.

Moldova ICT Summit 2015. As usual, CEED II actively participated in the planning and organization of the 6th edition of Moldova ICT Summit. The dates of the event were set for April 29-30, 2015, and the location was chosen to be a combination between Palatul Republicii and the nearby Codru hotel. CEED II continued to provide support to ATIC in organization of the event, being mainly focused on the ICT4Entrepreneurs and ICT4Education tracks. The agenda was developed and the contracting of speakers started. ATIC selected the media partners and the PR company and will start intensively promoting the event online, in the beginning of April.

Activity 5: Capacity building for ATIC

CEED II committed to support ATIC in the following initiatives: updating the Legal Pocket Guide, consolidating the B2B portal, and creating a catalog of ICT companies. The promotional activities for the B2B portal consolidation are ongoing, so is the data collection for the development of the ICT companies catalog.

Legal Pocket guide – after several consultations with the ATIC member companies, the need for an update of the Legal Pocket Guide (LPG) was confirmed and the format was agreed. CEED II requested and obtained an offer from the legal service provider, which developed the guide - Roger Gladei Attorney's office. The company was contracted to develop the update, and to include all new provisions of the Laws affecting the business of ICT companies in Moldova. A few new chapters will be added to the LPG, concerning:

- Consumer contracts, referring to standard contract provisions, abusive and misleading clauses, role of and interaction with the Agency for Consumer Protection;
- Dispute resolution, referring to the available civil and administrative review proceedings, alternative simplified civil (ordinance) procedure, safeguard measures, ways of appealing court judgments, enforcement of judgements, ADR (commercial arbitration and mediation).

The updated version of the LPG is expected in May 2015. The Subcontractor will also present the main provisions of the guidebook for the beneficiaries – ATIC members.

B2b portal / ICT companies catalog. Since ATIC members confirmed the worth of developing the catalogue of ICT companies, CEED II worked with ATIC to define the format and they started collecting company data to be included in the catalogue. Most of the data is identical to the one published on the b2b portal, however, for the printed version, it needs to be checked for accuracy and updated as needed.

A3. Tourism

CEED II assistance to promote Moldova as a tourism industry started to bring impactful results. Moldova's country image as a tourism destination has considerably enhanced in the last year, being ranked as the second best improved destination in 2015 by Adventure Travel Development Index (ATDI).

The 2015 Adventure Tourism Development Index is a ranking of countries around the world for adventure competitiveness, based on the factors that make adventure tourism destinations excel. As such, Moldova jumped 28 Places in the world rankings, mainly due to the score in the Safe and Welcoming category. Moldova was **109th** in 2011 and **44th** in the world this year!

Text Box 3. Moldova improved international tourism ranking

"Moldova - the second best improved destination in 2015"

*Adventure Travel
Development Index (ATDI).*

Factors like Moldova holiday national website, international awareness and campaigns, familiarization tours to Moldova for foreign media, travel agencies and opinion formers, dedicated press conferences at major tradeshows (like ITB Berlin, WTM London), and not least the new Tree of Life country image have contributed to this improved ranking.

To note, that with USAID CEED II support, during 2013-2015, over 120 international tourism writers got introduced to Moldova as a tourism destination, including prestigious media channels like CNN, BBC, Der Spiegel. Many of these are on the expert panel of ATDI. To remind that in 2012, after a USAID supported familiarization tour to Moldova, Lonely Planet declared Moldova #1 off-the-beaten-path travel destination in Europe. We have transformed this ranking into an opportunity, and used it as the slogan for the awareness campaign about Moldova.

Activity 1: Support Inbound Tourism Association

ANTRIM, the first Inbound Tourism Association of Moldova, created in January 2014 upon the initiative and with the support of CEED II, after one year of activity, is one of the most active and important NGOs in the sector, which promotes Moldova as a tourism destination and represents the interests of its members on the local and international markets.

The capacity of the Association is continuously growing. In this quarter, 2 important members new joined the association - Clepsidra Est, which represents the Hello Chisinau maps and currently develops and sells souvenirs with the new country brand, and Pourquoi Pas, a French company which opened recently its representative in Moldova and is selling Moldova as a new wine tourism destination on the French and Benelux markets. With a total of 14 members who work together, ANTRIM contributes to the development of the industry, achievement of common goals and improvement of business climate. Being impressed by the achievements the Association made within one year of activity, other 5 companies - Et Cetera winery, Poiana winery, Aero Team, ALL4GO and Radisson Blue are considering becoming members of ANTRIM in the near future.

Text Box 4. Testimonial from Tourism Company about the impact of the Association

“This is a great step forward for us as an Association and for each of the members that showed their trust and believe that together we will be able to contribute to the industry growth.” —

*Afanasie Esanu,
ANTRIM Deputy-President
Info Tourism Group owner & director*

On February 4, the Administrative Council met to discuss the 2014 Activities Report and to approve the Activity Plan for 2015. One of the major outcomes of this meeting was the election of the new President and Deputy President. New elections were held due to the fact that the association members wished to have a representative who would focus on major industry challenges and common goals and would add more value to the association and its members. CEED II supported ANTRIM and 2 of its founding members and most active tour operators in Moldova were voted for management positions: Emilian Dzugas, director of Tatrabis Company, became ANTRIM’s new President, and Afanasie Esanu, director of Info Tourism Group and Amadeus Travel, became ANTRIM’s Deputy President. On February 6, 2015, the first general meeting to summarize the first year of activity took place. During this meeting, all association members were informed about the changes in the Administrative Council and the Activity Plan for 2015 was approved.

In order to build capacity of the Association, in the context of CEED II’s support to the tourism industry in Moldova and considering the still major challenges in the field, ANTRIM organized an open discussion with the representatives of USAID and CEED II and the association members, on February 12, to discuss the impact of CEED II activities on the industry development in general and on the companies in particular, to analyze the main problems in the sector and the challenges for the development of the tourism industry in the country until 2020, as well as the opportunities to support the active promotion of Moldova as a tourism destination. This has had a good outcome, prompting the association members to become more active in supporting their ideas, to enhance their collaboration, and to organize such meetings more frequently.

In addition, on March 12, CEED II supported ANTRIM to organize a promotional B2B event “Discover Moldova” in Bucharest, Romania. This event was a follow-up to raise awareness on target markets. ANTRIM, supported by NTA for this edition, focused on raising awareness about Moldova’s tourism offers, particularly wine and MICE tourism. The participating Moldovan companies were wineries which provide tourism services (Asconi Winery, MIMI Winery, Et Cetera winery, Poiana Winery, Chateau Vartely, Purcari Winery, Branesti Winery), and important tour-operators that focus on MICE tourism in Moldova (Tatra-Bis, Amadeus travel, Solei-Turism). The companies had the chance to get closer to their potential customers.

Text Box 5. Testimonial about participation to a B2B event in Romania

“This event has served as bridge between the two banks of the Prut River and we hope that in terms of tourism, events like this will become a beautiful tradition in the future.”

*Emilian Dzugas,
ANTRIM President,*

The event had more than 250 participants of the Romanian business community, civil society representatives, diplomatic community and the media. The event was attended by the Moldovan Ambassador to Bucharest, Mr. Iurie Renita, the High Representative of the Government of Romania for Moldova, Ms. Iuliana Gorea-Costin, General Director of NTA, Mr. Platon and his Romanian counterpart, Ms. Simona Allice Man and other representatives of the diplomatic missions accredited in Bucharest. The Moldovan companies established more than 30 contacts in total and made partnerships with representatives of the major companies in Romania from the banking, healthcare, IT, and others areas.



Figure 16. Presentation of Moldovan wines by the President of the Romanian Sommelier Association, Laurentiu Achim

In this quarter, with CEED II support, ANTRIM organized a workshop on Social Media Tools and their usage in tourism promotion activities. The workshop was delivered on March 19 and brought together 16 participants from tourism agencies, hotels, rural-pensions, wineries, which had the opportunity to learn about new trends in marketing using social media, how to efficiently use the funds for online promotion. The participants had the unique opportunity to discuss with professionals about challenges and useful tools that can help increase their visibly and target potential customers.

On March 23-27, ANTRIM and CEED II have supported the visit to Moldova for the second time of the US Forest Service representatives from Washington. During their visit, they had a very busy agenda meeting with USAID and CEED II representatives, Moldsilva management, NTA and the local community. On March 25, Elizabeth Close lead a workshop on Recreation and Community Partnerships in Butuceni village for 15 participants from Moldsilva, local administration, pensions, tour operators, ANTRIM members and CEED II representatives.

Another workshop dedicated only to Moldsilva employees from natural reserves around Moldova took place on March 26. A group of 15 participants learned about good practices in reserve management and how to improve the infrastructure and the experience of visitors. As a result, the US Forest Service specialists made recommendations that will help Moldsilva integrate the forests in the tourism tours as well as ensure the sustainability of reserves. ANTRIM and Moldsilva intend to sign a cooperation memorandum for organization of common workshops and establishment of a working group, so the association can provide support to Moldsilva to include tourism initiatives in their activity plans to coincide with the tourism development strategy 2020 and with the association's activity plan. Because Moldsilva is a state agency and is not able to develop and manage tourism areas in the forests, a good practice would be to rent our areas, which Moldova is not doing anymore; therefore, the US Forest colleagues are open to share with Moldsilva the US experience in this area. Moreover, the delegates showed interest in helping ANTRIM to find partners in America, who would co-finance an experience exchange trip to the US for a group of representatives from Moldsilva, NTA and ANTRIM to see how forests are managed in the US.

Activity 2: Consolidate Moldova Holiday website and promotion in target markets

Ongoing digital promotional campaign for moldovaholiday.travel & National Tourism Brand.

In order to increase the visibility of moldovaholiday.travel website on AdWords and that of the National Tourism Brand on social media, CEED II engaged Granat, a specialized company that developed a digital strategy for the National Tourism Brand (& Moldova Holiday) for 3 months Feb-May, to manage a social media campaign. The communication goals of the campaign is to increase brand awareness, create a dialogue and increase engagement with target audiences, increase the number and quality of website visits, promote specific tourism offers. The company will review the current assets, will analyze the traffic on www.moldovaholiday.travel and will conduct an assessment of the impact of past promo campaigns on the website traffic, will perform an in-depth google analytics and server data analysis, amplify the message to the target audience, look at the on cost-efficiency, as well as other aspects .

The social media campaign started on February 18 and had a great impact through the number of people engaged and the visibility reached. Also, Granat managed a viral campaign to encourage Moldovans worldwide to promote the country by replacing their cover photo with the proposed one during the Martisor, which resulted in 629 new fans during 1-8 March, from the total of 2392 new fans in this month, 375 people changed their cover photos and 54.000 potential visitors were reached. Moreover, from the begging of the campaign, more than 345.000 people found out interesting things about Moldova's traditions, culture, wines, monasteries and many other tourism attractions, they probably didn't know about.



Figure 17. The visual for the viral campaign on Facebook celebrating Martisor during March

Moldova Holiday mobile application. Along with Moldova Holiday web-site, CEED supported the development of a 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 both Android and iOS, and they cover only specific areas of tourism. The newly developed application features Top 50 tourism attractions from Moldova and was developed by Muzic Access, according to the model of Slovenia's Top 50 application, which was created by the same company. The application presents the major wineries, cultural and architectural monuments, museums, and monasteries in Moldova. It can



Figure 18. Moldova Holiday mob application visual

be downloaded for free, in English, for iOS and Android from AppStore and Google Play respectively. The application was designed in line with the tourism brand usage guidebook. It provides general information about tourism destinations and their location on the map and makes it possible to plan a visit, invite friends through social networks, set and view the route by using the offline map, and includes other features. As of March 20, 2015, the application was available in two versions on iOS and Android, respectively in the AppStore and Google Play, and could be downloaded for free for both phone and ipad.

Moldova Holiday French and German languages implementation. After in 2014, the moldovaholiday.travel website was upgraded to Joomla 3.0, and had a series of design upgrades following the trends and accessibility in web designing. In addition, during the year, CEED II has made partnerships with the French Alliance and GIZ to develop the French and German versions of the web site, as these two were identified as been the main target markets for Moldovan tourism, and having the information available in these languages will help reach potential visitors from these countries much easier and more effectively.

In this connection, during the reporting period, RT design Studio contracted by CEED II continued the work on Multilanguage implementation, especially implementation of additional languages support in the Multilanguage module – German and French languages, content implementation of the German and French website interfaces (main page, menus, categories and sections, sliders, inner pages blocks), integration of the content in German and French languages, Search engines optimization measures after implementation of additional languages implementation and execute guide – what to do – multiple size screen adaptation. The new languages will be launched in the mid-April.

Activity 3: Support participations in trade shows in target markets

CEED II continued in this quarter to support local tourism operators to increase their export capabilities and demand on international marketplaces. In this mean, CEED II assisted several interested companies to participate at important trade exhibitions.

Participation at Ferrien Messe in Vienna. On January 15-18, 2015, six Moldovan companies, Solei-Turism, TatraBis, AirMoldova, Cricova Winery, Moldova Tur, Amadeus Travel Lufthansa City Center, and the National Tourism Agency (NTA) participated with a stand at the Ferrien Messe International Tourism exhibition in Vienna, Austria. Ferien-Messe is the leading public access tourism trade fair in Austria, gathering over 700 exhibitors from over 70 countries in an international event dedicated to holidays, travel and leisure. The purpose of these trade shows is to provide to potential visitors updated information about the newest offers, products, and destinations. Wines and gastronomy were the most attractive tourism products in which visitors showed a high interest.

Starting from March of 2015, Air Moldova will launch a direct fly to Vienna for a price starting at 99 Euro, which will make Moldova easily accessible. Moreover, as CEED II will organize familiarization tours for journalists and tour operators, Air Moldova showed interest in partnering the visit of potential partners from Austria by covering the flying costs. This is a great start of a long-term partnership that will help increase awareness and incoming of visitors from Austria.

Participation at Vakantiebeurs in Utrecht. On January 13-18, 2015 Moldovan companies Solei-Turism and Amadeus Travel Lufthansa City Center participated with a stand at the Vakantiebeurs International Tourism exhibition in Utrecht, Netherlands.

This was the first exhibition featuring the new tourism country brand- The tree of Life. The exhibition was selected as one of the most important tourism consumer events in the world, hosting more than 1,400 participants every year.

After five years of break, this is Moldova's first participation at this exhibition with the new brand. The participation turned out successful as many companies showed interest to work with Moldova. After the exhibition, the Embassy of the Republic of Moldova in the Kingdom of Netherlands stated its interest in supporting the tourism industry and started to collaborate with ANTRIM to assist its members with expertise through the PUM program. Moreover, as CEED II will be organizing familiarization tours for journalists and tour operators, the Embassy offered support in finding good candidates for participation to maximize the informational impact.

Participation at EMITT in Istanbul. On January 22-25, 2015, three Moldovan companies - TatraBis, Chateau Vartely, Amadeus Travel Lufthansa City Center, and NTA participated with a stand at EMITT Tourism Exhibition in Istanbul, Turkey.

Breaking a new exhibitor and visitor record, the 19th edition of EMITT, with 71 participating countries and 4,550 exhibitors was a success. With 64,350 professionals worldwide and with 77,750 travelers, it was visited by a total of 142,100 people. According to the Marketing Strategy, Turkey is the sixth target market for the Moldovan tourism offer. This was a great opportunity to show Moldova from a different perspective, as until now, most of the visitors from Turkey were visiting Moldova for business, having representatives in various fields: MICE, leisure, and health.

Participation at ITB Berlin Exhibition. On March 4- 8, 2015, the Moldovan companies Solei-Turism, TatraBis, AirMoldova, ALL4GO, Amadeus Travel Lufthansa City Center, Moldova Tur, and Et Cetera Winery along with the National Tourism Agency of Moldova, participated with a stand at the ITB Tourism Trade Show in Berlin, Germany. This is the biggest B2B tourism exhibition, with 11,000 exhibitors. Moreover, in order to make more visible Moldova's presence at the exhibition, CEED II contracted Xenos Comm who organized for the second time a press conference on

Text Box 6. Testimonial about Moldova's participation at Vakantiebeurs in Utrecht

"After a five-year break, Moldova is back to the Netherland tourism market. We believe the participation at this exhibition will have a great impact on the tourism development in Moldova, as it fits perfectly with the Dutch people requirements in terms of vacations."

*His Excellence, Emilian Brenici,
Moldovan Ambassador to Netherlands*



Figure 19. Moldova's stand at Vakantiebeurs in Utrecht, Netherlands. The first international tourism exhibition Presenting Moldova's new tourism brand - "The Tree of

Wednesday, March 4th. This was the first international press conference presenting the new country brand “Tree of Life”. 25 travel journalists and writers from German media such as Berliner-Umschau, sr-online.de, ZDF, C-BTV, Falcon-leipzig, Muenzenbergmedien, Netzpool and Magazine4you, were introduced to the most popular tourist attractions including wineries, many Orthodox monasteries, Middle Age cities, rural life, culture and of course the "Tree of Life".

Text Box 7. Testimonial about Moldova’s participation at ITB Berlin Exhibition

“This is the best stand we have ever had at international exhibitions. The design is modern and unique, emphasizing the new brand and Moldova’s tourism offer. People were very curious and liked it.”

*Olga Luchianov,
Amadeus Travel Incoming Manager*

Journalists showed a strong interest in Moldova and its new image and the most active of them will be invited to attend a familiarization tour in Moldova in April. Moreover, CEED II offered support to the NTA to participate at the Danube Salon, which is a unique event with an attractive concept for promotion of the Danube Strategy countries (Germany, Austria, Hungary, Czech Republic, Slovak Republic, Slovenia, Bulgaria, Romania, Croatia, Bosnia and Herzegovina, Serbia, Montenegro, Moldova, and Ukraine) and became branded platform for networking. The major goals of this event are to create a pool of Danube opinion leaders, consisting of visitors and exhibitors, and to deliver and share memorable visitors’ experiences. As these events are strategically important, CEED II took care of all organizational details: new stand design, stand décor elements production, translation into German and production of promotional materials, transportation of wine to ensure a good presentation at these important events.



Figure 20. Moldova’s stand at WTM London. Presenting Moldova as the # 1 off the beaten path travel destination in Europe.

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

The organization of group familiarization tours is a very efficient method of raising awareness in the target markets about Moldova as a tourism destination; this is a fact proven by the outcomes of this kind of activity.

Familiarization (fam) tours for foreign tour operators and journalists. *Enhancing trade by fam tours organization for foreign tour operators.* During March-April, CEED II will co-finance the visit of the tour operators from target markets as a result of participation at Vakantiebeurs Exhibition in Netherlands and Ferrien Messe Exhibition in Vienna. Eleven foreign tour operators are willing to visit Moldova in individual familiarization trips, namely Biblische Reisen, Eurotours International, GTA-SKY-WAYS, Blini Reizen, KRAS, EuroCult, Travel Club SKYBIRD, Harry Fine Associates, and Carpatica. Some companies sell Moldova only to individuals and all are considering to start selling Moldova as a tourist destination to groups, some of them have never sold Moldova and this visit will be the final stage to commence business collaboration with Moldovan partners for touristic services. As a result, Mr. Fine, the director of Harry Fine Associates, who established in 1988 the UK office of leading international DMCs (Destination Management Companies), had active discussions with local government and private companies, that could contribute to the MICE development in Moldova. He showed a great interest in what Moldova can offer in terms of MICE tourism and invited local partners to participate at the Politicians Forum on May 19th, an event which is taking place as a part of the IMEX Exhibitions in Frankfurt, the biggest MICE event in Europe. Mr. Fine met with Tatrabis general director during WTM in London and both are now considering expanding their partnership.

Text Box 8. Testimonial about Moldova's MICE tourism potential

"Due to its geo-political position, Moldova has a great potential for MICE tourism, although the infrastructure is currently not up to the international standards. The appearance in Moldova of big hotels and congress centers will help position and promote the country as a new MICE destination."

*Harry Fine,
Director of Harry Fine Associates UK*

Raising Moldova destination image and international awareness supporting fam tours for foreign journalists. The 5th group fam tour will take place on April 22-26, 2015, right after the Easter holidays. As this activity has been resulting in a good impact on the awareness raise on the target markets, and needs continuity, it will be the second time when the tour will be led by the National Inbound Tourism Association and supported by its members such as hotels, wineries, tour operators. The participants, who were selected as a result of the participation at international tourism exhibitions are a TV team from Slovakia, one journalist from Austria (Mrs. Munz is correspondent at the Touristica International), one journalist from Belgium (Mr. Bruster is working for several leading media in Belgium like the daily De Standaard, the oldest trade and travel magazine, Travel Express), two journalists from Netherlands (Mrs. Eerdman is independent publisher and chief editor, and Mrs. Kombrink is a freelance journalist writing for Dutch media publications, writing for De Telegraaf, the biggest Dutch daily newspaper), and one journalist from Israel (Mrs. Raz is the Editor in Chief of the National Geographic publications in Israel, including the Hebrew editions of National Geographic, Traveler and Kids). The participants will be guided through an intensive but interesting program that will feature Moldovan wines, cultural heritage, ethnographic values, and will experience the new products developed by the local tour operators. The intended outcome is for the foreign operator to begin booking tours to Moldova and for travel writers to write about Moldova as a tourism destination.

Additionally, CEED II collaborated with ANTRIM to organize on April 21-26 the first familiarization tour "Discover Moldova" for Romanian bloggers/photographers in order to get them acknowledged with Moldova from tourism point of view in the neighboring country.

Activity 5: Tourism pilot Zone development

Although this activity is very important and was included in the activity plan for 2014-2015, in process of its implementation, CEED II decided to suspend it as the time frame is too tight. Instead, the project decided to focus on the tourism country image and the general promotion of Moldova as a tourism destination.

Activity 6: Tourism attraction improvement and new products development

In the previous quarter, CEED II, jointly with Moldovan Investment and Export Promotion Organization (MIEPO), have organized the Hackathon "Generator", which aimed at gathering new ideas for the creation of four IT products with practical application in export sectors, such as light industry, wine, and inbound tourism. The best ideas are planned to be part of the virtual platform for Moldova's Pavilion at Milano Expo 2015, which is a great opportunity for Moldova to be promoted as a tourism destination.

In this quarter, four winning startups, Winefique, FOLKS, EpicTravel and We Love Moldova, received financial support to develop their project to be presented at Milano Expo further on. EpicTravel and We Love Moldova are closely related to tourism as the first one is an online platform that will sell adventure tours from local tour operators, and at the same time will work on the creation of their own tours, while the second project is a platform that will sell products and souvenirs with Moldova tourism logo-Tree of life, Wine of Moldova and Din Inima. Epik Travel is still working on its products, while We Love Moldova has launched its platform where it sells its products, and fully implements its Ambassador project, being ready to present their platform at Milano Expo.

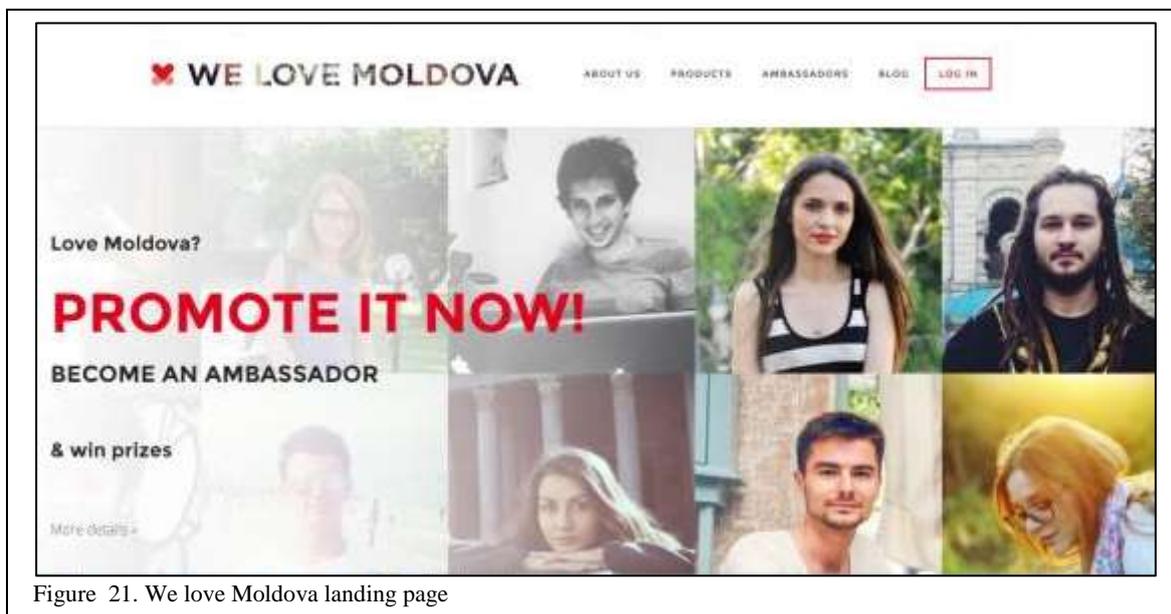


Figure 21. We love Moldova landing page

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

Enhancing tourism competitiveness through public policy initiative on VAT reduction for hotels.

One of the major problems faced by Moldova's tourism industry is the high cost for accommodation, which has a direct impact on Moldova's accessibility. Currently, the accommodation price in Moldova is the highest in the region and includes 20% VAT and 5% perceived by local authorities from the accommodation. CEED II decided to lay the foundation of a future public initiative to reduce the VAT for hotel services to 9%, and to supersede the current 5% tax by 1 EUR local tax. To start this initiative, CEED II together with NTA conducted a research and identified one of the most experienced consultants in hospitality, Mr. Catanoi. As a result, CEED II contracted Mr. Catanoi to

develop the public policy initiative, which should include: an analysis of the options to minimize the VAT tax for hotel room hosting service, the substitution of the hotel hosting tax with a fixed municipal tax, and the subsequent regulatory impact assessment for this proposal. This will result in a lower final price for accommodation and consequently - an increased number of visitors, reducing illegal accommodation, increasing employment and adding to budget revenues.

This assignment will help implement the further initiatives taken by the National Tourism Agency in partnership with the Hotel and Restaurant Association, which are included in the Tourism Development Strategy 2020, to reduce the prices for accommodation and make Moldova more affordable and competitive as a tourism destination in the region. The initiative is planned to be finalized by the end of April. Later on, NTA will lobby it to the competent authorities.

Enhancing destination image developing Moldova Tourism Brandbook. After the National Tourism Country Brand Program was launched on November 20, CEED II continued its support to the National Tourism Agency in terms of rebranding, positioning, marketing and promotion. In February, Publicis, the company contracted by CEED II to develop the brandbook in Romanian, Russian and English for the new tourism brand ‘Tree of Life’, finalized the work and presented the new brand book and explained the usage rules to all 22 employees working at NTA. As NTA started to use the brand actively, it is very important that they ensure a proper and correct usage.

In February, the development of the *marketing and promotion plan was finalized*, according to the new tourism country brand program initiated by CEED II. The marketing and promotion plan includes a general and a tactical part, providing a description of Moldova’s tourism offer and development perspectives; Positioning of Moldovan tourism offer and Unique Sales Proposition for the Moldovan tourism industry (differentiating factors from other competitor markets); Key markets for Moldovan tourism, including current and perspective markets; Growth indicators for each market; Target customer segmentation for Moldovan tourism, matching the product offer; Marketing objectives such as increased awareness among targeted consumers and brand management, which will help the successful implementation of the marketing plan; Promotion plan for 3 years (2015-2017), including a schedule of tactical marketing and promotion actions for each market, with estimated budgets. CEED II, along with the marketing expert, held 3 meetings with NTA to discuss the Plan and make sure the main counterpart is included in the elaboration process. As the plan was finalized in February, in March, it was presented to the sector. All the recommendations made by the private sector representatives will be included in the final version of the plan and will be adopted as an official promotional plan by the NTA director in April.

Souvenir shop strategy and first line launch.

Moldova Tourism Brand was established by CEED II and the National Tourism Agency of Moldova to spearhead the nation’s first international marketing effort to promote Moldova as an up-and-coming tourist destination. One component of the national brand marketing and promotion plan includes the development of branded souvenirs as well as retail locations to sell high-quality souvenirs. In this connection, CEED II engaged a consultant who developed the Souvenir Development Strategy. This outlines the general approach and objectives for developing branded souvenirs and establishing souvenir retailers, challenges and solutions, recommended business models and counterparts. The Strategy was presented to the NTA. Aside from this, the consultant made an analysis and identified promotional opportunities at the airport, in addition to the sale of Brand Moldova souvenirs in the Dufremol duty free shop. Furthermore, CEED II engaged another tourism consultant to work on the implementation of the souvenir shop project. He initiated conversations with a series of hotels and wineries such as Jazz hotel, Jolly Alon Hotel, Codru Hotel, Butuceni Pension, Purcari Winery, Chateau Vartely, and Cricova Winery. In addition, he is working with textile/clothing/fashion accessories developed together with the local producer Vasconi,

Text Box 9. Testimonial about souvenir shop launch

“For us, it is very important that tourists have an authentic experience from the very moment they arrived in the country until they leave and that they can take great memories and a small part of Moldova with them back home”

*Nicolae Platon,
NTA Director*

as well as ceramics, glass, postcards and other types of souvenirs, developed with other partners and businesses (Perna Mea, Tucano). It will include traditional souvenirs, such as magnets and more unique ones. The souvenirs will be branded with the new country image.

As such, on March 19, together with NTA and ANTRIM, CEED II organized the official launch of the first souvenir line during a press conference. Within it, media representatives have learned about the latest success in the promotion of Moldova as a tourism destination and saw the first t-shirts, the collection of pillows, magnets, tumblers, cups and many other branded souvenirs with the tree of life. The same day, three Tucano Coffee cafes in Chisinau started to sell souvenirs with this brand. One week later, Vasconi started to sell branded t-shirts and bags in three stores located centrally, so they are easier to find by locals, expats and foreigners.



Figure 22. Press Conference on first line souvenir launch, March 19, 2015

Moreover, while CEED II identified the promotional opportunities of the new tourism brand at the airport, the Consultant is working directly with the advertising company managing the airport and negotiated placements of banners with promotional and non-commercial purposes. Publicis is developing the design. Casa Media agreed to offer special prices and starting from April 10, the 4 visuals will be placed in the arrival zone at the airport, as well as in the waiting area, to inform people about the mobile application and tourism offer of Moldova. While CEED II launched the Tourism Mobile Application, the consultant negotiated with Orange to organize a promotional campaign at the airport.

After the new tourism country brand was launched, the promotional video developed by CEED II earlier in 2014 and updated, featuring the new logo and slogan, started to be broadcasted on Euronews, in the morning and afternoon, from Monday to Friday. This was a one-month trial period, during which moldovaholiday, the main tourism informational platform was accessed by 25.000 foreign visitors.

Brand licensing agreement. The formal owner of the new logo is NTA and the logo now being registered at AGEPI. Due to the fact that interest in using the brand is very high, in order to ensure

that it is used correctly CEED II engaged a local legal company to help the National Tourism Agency find a mechanism of licensing the legal entities who want to use the tourism Mark for promotional and commercial purposes. The company will develop Rules/Guidelines on the licensing rights to use the trademark, the trademark licensing agreement to be entered into by the National Tourism Agency, the owner of the Mark, and the third party using the Mark for commercial and promotional purposes. This will contain general information about the brand and will set out the terms and conditions for its usage, the usage of royalties or fees, and will deliver a brief presentation for the final beneficiary -the National Tourism Agency - on what a brand is, why companies brand their products, and why companies license the usage of their brands. These will be finalized by the end of April, will be approved by NTA, and will start to be used as means for managing the brand usage.

A4. Wine Industry Activities

Activity 1. Support the institutional capacities of the National Office for Vine and Wine (ONVV) and strengthen its role in the wine sector development

During the reporting period, CEED II project provided support to strengthen ONVV's capacities throughout local consultancy, aiming to improve institutional business process, professional knowledge of the sector and the communication activities.

Continued ONVV institutional development. CEED II project continued its assistance to ONVV, aiming to consolidate it institutionally and contribute to an efficient functionality of the institution. As such, within the quarterly period, ONVV has completed and approved the staff job description, tailored with the competencies of the ONVV by law and statute. Additionally, the CEED II consultant, Lilian Bejan has submitted to the ONVV for approval the detailed description of each of the performance indicators to be monitored by the ONVV as progress on their activities. A set of key recommendations and suggestions was submitted to ONVV for the implementation of the M&E procedures within the staff responsibilities and in the ONVV reports.

Additionally, CEED II provided consultancy to ONVV's director, Dumitru Munteanu, on the efficient organization of the budgeting and monitoring progress of activities' implementation. As such, Tatiana Dudka has assisted the ONVV director in developing templates for the budget allocation plan, for operations management, as well as activity templates. A set of recommendations aimed to exclude the existing lacunas was sent to the ONVV for implementation.

Based on these recommendations, ONVV requested CEED II project assistance for the development of an institutional communication strategy and a subsequent toolkit for implementation. Consequently, in March 2015, CEED II contracted a local PR&communication consultant, Mrs Gurau, to support the ONVV in this matter. During March, the Consultant developed a 'Preliminary assessment', including interviews of about 25 industry stakeholders, a SWOT analysis, the key strategic objectives, and initiated the development of the ONVV Communication Strategy that will include: the definition of communication objectives, of the purpose and the target; the key messages and related mix; the tools for responding to expectations and achieving objectives; the related activities, and performance indicators.

CEED II initiated the development of the 'business& industry intelligence' services to be provided by the ONVV to the industry stakeholders. These new ONVV products shall respond to the arising need of the private and also the public sector actors to have access to professional information about the industry development, the production trends, the markets' development, the international innovative solutions, etc.

The ONVV 'intelligence mix' shall include the following components: (i) industry intelligence & macro-economic appraisal; (ii) marketing intelligence; (iii) product intelligence; and (iv) legal®ulatory consultancy. These products shall be communicated to the sector using the

communication tools which shall be proposed within the Institutional Communication Toolkit (Mrs Gurau's assignment).

CEED II has contracted two local consultants to update the Wine Industry Appraisal¹ study till December 31, 2014, and to develop a plan and recommended data sources for the constant update of these indicators by ONVV. During this quarter, ONVV subcontracted a local business intelligence consulting agency to aggregate data and release assessments according to a plan. These information will cover the '(i) industry intelligence & macro-economic appraisal component from the ONVV 'intelligence product mix'.

Joining CEED II's efforts, the EIB Technical Assistance Program 'Filiere du Vin' is developing in parallel the 'marketing intelligence' component, and CBI program has agreed to further contribute by facilitating access to some market data.

The development and the implementation of the ONVV 'intelligence mix' of products will contribute to positioning the Office as a credible professional organization, representative of the wine industry. Also, the wine producers will benefit directly from these services, increasing their knowledge, following international trends, and becoming more competitive.

Ultimately, CEED II continued its support to the ONVV through professional PR&communication services provided by a local PR agency. ONVV has earned higher visibility and has generated coverage and advertisement of its activities in the media.

ONVV's 2015 activity plan adopted and 2014 annual report accepted. Within the last quarter, ONVV developed the final 2014 annual report on activities, as well as its new Activity Plan for 2015. The project continually supported ONVV throughout the international consultant, Marco Tiggelman and through the CEED II wine industry manager. The purpose was to deliver a report and a new plan following the management practices introduced within ONVV during their start-up.

ONVV's Council for Coordination approved the 2014 Annual Report and the 2015 Annual Work Plan, including the marketing plan and the winemaking & viticulture activity plan. In 2014, ONVV used a marketing budget of about \$ 450,000, while the total ONVV expenses budget for 2014 was \$ 800,000. The start-up of activities, equipment and vehicles' procurement, office rent and subsequent works have weighed about 40% of the total institutional budget.

ONVV's planned budget for 2015 is of about \$1, 200,000 for a set of strategic activities for the wine industry, including the marketing activities (approx. \$900,000) and viticulture & winemaking supporting activities (approx.\$ 300,000). ONVV's work plan follows the strategies and conceptual approaches that the CEED II project has endorsed within its activities for the last 3 years. This



Figure 22 . An editorial about Wine of Moldova in the Chinese journal Fine-Drinks.

¹ The Wine Industry Appraisal – an extensive study of the wine industry, developed in May 2012 by CEED II project within the Wine Country Brand development phase.

demonstrates that the new institution understands the areas for development of the sector and is willing to continue the initiatives of CEED II in the wine industry.

In February 2015, ONVV, with CEED II support, organized a round table of consultations with the public authorities and institutions, aimed to establish a framework for collaboration to ensure more efficient implementation of the Wine of Moldova program. Within this event, the AGEPI, the Tourism Agency, the Agency for Consumers' Protection, the Chamber of Commerce and Industry, and MIEPO have expressed their full support of ONVV's activities and their interest in signing MoU's for this scope.

Strengthened ONVV role in lobby and advocacy. ONVV has increased and strengthened its role as a wine industry representative ensuring the lobby and advocacy for the sector. CEED II project provided support for tactical organization of the lobby and advocacy actions and contributed to repositioning ONVV's role within the Ministry of Agriculture and Food Industry as a new Minister, Mr. Ion Sula, was appointed.

As such, ONVV implemented the following initiatives: promoted amendments and advocated for changes into the Regulation of the Payments in Agriculture (pending approval) and the controversial Technical Regulation on the wine industry organization (more details in activity no.4); proposed new normative documents for approval, such as the Concept of the State Wine and Vine Register, the Regulation on the organoleptic assessment of wine products; and started to develop other sectorial normative documents.

In addition, ONVV was included by MAFI in the working groups coordinating the reform of the CNVVC and the one related to the certification procedures and was recommended by the new Minister to review all the documents related to the wine industry before he would sign/approve them.

This is an important step forward if we consider the fact that previously, the MAFI Department for Wine Sector was blocking ONVV's initiatives and hampering the Office's attempts to advocate changes into policies and regulations.

IT solutions for the wine industry. During the reporting period, CEED II consultant, Mr. Eugeniu Platita, developed the Technical Specifications on the IT solution for electronic keeping of wine registries. In this regard, the consultant and ONVV met with the wine sector representatives and defined the main business processes managed by the wineries while keeping the internal wine registries.

After the Technical Specifications were developed, ONVV, supported by CEED II, succeeded to find additional funding for the development of this software from the Technical Assistance Program to the "Filiere du Vin" EIB PIU. Two international IT experts will be contracted to develop the IT solution based on the Technical Specifications provided by CEED II project.

The implementation of such an IT solution in the wineries will ease their internal procedures, reduce costs and offer modern and efficient tools for business management. The software is expected to allow interconnections with the State Wine and Vine Register developed jointly by USAID/ACSA and the CZDA/UKZUZ. The producers will be able to submit electronically declarations and reports and connect the internal wine registries with their accounting software (i.e. 1C).

Activity 2. Support the implementation of the "Wine of Moldova" promotion program and wine export diversification

The implementation of this activity was organized in collaboration with ONVV as the main implementer of the Wine of Moldova promotion program. The objectives of the promotion program were: (i) to increase awareness of the Wine of Moldova as a wine country brand and to build the brand notoriety locally and internationally; (ii) to follow rigorously the key guidelines of the Wine of

Moldova marketing & promotion framework, the communication strategy and of the brandbook; and (iii) to ensure a constant and verified quality of the wine products promoted under the country brand.

During the reporting period, the marketing activities included such typology as brand awareness activities throughout international press work; participation at professional wine tradeshow and organization of specially tailored promotion activities for Wine of Moldova on the target markets.

B2B events for Wine of Moldova on new markets. On February 19, 2015, a new Wine of Moldova Vernissage was been organized in Talin, Estonia, at which 17 wine and divin (brandy) producers participated under the wine country brand. The event was organized with support from the Estonian Ministry of Agriculture and the ONVV. CEED II supported the development of the event concept, the presentation and the PR activities related to the event. The Vernissage started with a guided tasting for about 30 journalists and sommeliers, presented by the Best Sommelier of Estonia in 2013, Kristian Markii. Later, the event continued with a B2B walk-around tasting, in which about 120 wine importers and traders participated, including the Estonian Minister of Agriculture, Mr. Ivarii Padar.

The companies witnessed an increased interest from Estonian importers for the Moldovan wines, and many of them initiated discussions for new deliveries in Estonia. Et Cetera winery has even signed a contract with a local importer for their quality wine, which is planned to be sold in restaurants and wine shops.

Several articles on Moldovan wines have been published as a result of the event, contributing to building a new image of Wine of Moldova in Estonia.

Successful participation of Wine of Moldova at ProWein 2015. On March 15-17, 2015, Wine of Moldova was showcased the second time at ProWein exhibition in Dusseldorf (Germany), the biggest international specialized trade fair in Europe and the most lucrative one. The number of wineries represented at the national booth has doubled since the last year - 27 wineries and 3 small wine producers, member of the Association of Small Wine Producers, which displayed about 300 Moldovan wine SKUs.

The Moldova's presence at ProWein has been a qualitative once, including several components:

- (i) *PR component* – Wine of Moldova continued the best practice of last year, and organized PR activities throughout a professional PR-Agency, Xenos-PR, which was contracted by



Figure 23. Moldovan Ambassador in Estonia, Mr. Victor Guzun, actively participated at the Wine of Moldova Vernissage in Talin

Text Box 10. Testimonial about participation at ProWein

"We are very content with the results achieved at ProWein. We expect to have at least two new contracts signed with new partners, but also to increase current volumes contracted by our importers from EU with at least 15 %, in favor of our quality wines. At ProWein we succeeded to expand our sales on German market and we have found a new importer for United Kingdom"

*Ludmila Gogu
General Director of Chateau Vartely*

CEED II project. The agency has organized the press work on behalf of the ONVV and executed the PR activities: sending the press releases, invitation to the national booth and the master classes, answering requests from the press and advising on the advertisement and post-PR activities. Two press releases, in English and German, has been sent out before the exhibition, being disseminated to about 3000 addressees and placed on the social media resources. Additionally, Wine of Moldova has been advertised in the ProWein participants' catalogue, in the events' program and on ProWein web-site.

In result, the some important journalists approached the stand, and met the Wines of Moldova, such as: Robert Joseph, a famous British wine writer, author of more than 200 books on wines and editor of Meininger Wine Business International; Subhash Arora, president of the Indian International Wine Academy; but also a big number of wine journalists from the export markets of Moldovan wines.

- (ii) *Wine of Moldova Master-Classes* – 5 master classes have been organized at the national booth, which included the presentation of the most emblematic wines from Moldova: legendary wines; famous cuvees; indigenous varietal wines; PGI wines. About 25 SKUs included in the master-classes tasting sheets have been commented and presented by the famous US Master of Wine, Christy Canterbury. About 65 wine importers, journalists and sommeliers have attended the master classes. These professional activities at the booth have also impacted on the attractivity of the stand, as many visitors were stopping by, once they were seeing that a tasting seminar is being organized.

Text Box 11. Testimonial about provided support for the participation at ProWein

“We were the first time at ProWein, as we are a small wine producer. But we have had very good business contacts and even received some express of interest from some German and English wine importers. All the visitors were so impressed by the quality of our wines as they didn't think in Moldova this is possible. We could never participate at this international fair if the ONVV wouldn't have covered the expenses throughout the National Wine&Vine Fund”

Constantin Stratan,
CFR

- (iii) *National Wine of Moldova booth*- a twice bigger and very impressive stand, with a modern and eye-catching design has made Wine of Moldova's image noticeable and appreciated by the visitors. All the wineries displayed at the booth had quality consistent wines, and these have been listed in a common brochure, with additional generic information. The Wine of Moldova brandbook has been followed and the POSM materials contributed to more visual impact, i.e. branded bags distributed at the fair.

Another premiere of this edition is the participation at ProWein of the 6 PGI Divin producers (the PGI brandy), who will be displayed at a common booth in the specialized hall. This is adding value to the Wine of Moldova image, as the 'divin' is a quality brandy with a protected geographical indication and contributes to the image of a quality wine producer of Moldova.



Figure 24. Moldovan wine industry: 30 wineries, the ONVV, Minister Ion Sula - all united at a common booth 'Wine of Moldova' at ProWein exhibition, Dusseldorf, March 15-17, 2015

The newly appointed Minister of Agriculture and Food Industry, Ion Sula, has participated at ProWein exhibition, showing his support to the ONVV and the wineries. This was an excellent opportunity for the high official to see the international wine world and to acknowledge that the recent reforms, supported by USAID CEED II, such as: the establishment of the ONVV, the development of the Wine of Moldova program and the legislative reform were key actions to be taken in order to place Republic of Moldova on the international wine map.

Minister SULA had a meeting with the general director of the Austrian Wine Marketing Board, Mr. Wilhelm Klinger, and Johannes Schmuckenschlager, chairman of the Austrian Viticulturists' Association and deputy in the Austrian Parliament, discussing about future collaboration on the wine sector initiatives.

Following the fair, the wineries announced they earned about one hundred of new business contacts, have had about 60 business meetings at the fair and the ONVV estimated that about 25 new contracts for wine delivery in European Union will be signed in result of ProWein.

A team of journalists of national TV channels (Prime and Publika TV) have joined Moldovan wineries at ProWein, filming a series of news and reportages, which were broadcasted in Moldova and informed about the success of Wine of Moldova at ProWein.

Wine of Moldova PR and international brand building. CEED II supported ONVV in building Wine of Moldova brand awareness on the international arena. In this quarter, CEED II decided to sponsor the publication of a four-pages' editorial on Moldovan wines in one of the most reputed wine journal in the world – Decanter magazine. The article will be included in the July issue, which will be released in June, and is the official issue to be spread at the Vinexpo fair held in Bordeaux, in June 2015. The famous British Master of Wine, Caroline Gilby, a connoisseur of Moldovan wines and editor of major wine journals, will be writing the article on Wine of Moldova.

Additionally, an article on Wine of Moldova has been published in a Japanese journal "The Wine Kingdom", released in February 2015, and another 2-page article in Estonian 'DzD Postimees' journal, being one of the largest readerships in Estonia.

PR&trade campaigns on the target markets. The ONVV, assisted by CEED II consultant, Marco Tiggelman has organized an international tender to contract services of a European marketing & PR agency to implement a PR &trade activity on Czech and Polish markets. Simultaneously, CEED II has launched a RFQ on the local market to develop the campaign toolkit and creative content. These campaigns shall be initiated in May 2015.

Activity 3. Promoting the wine culture, sommelier services and wine education on the local market

During the reporting period, CEED II project implemented dynamic activities related to the promotion of the wine culture on the local market, including : (i) showcase of Moldovan quality wines at the 'Fabricat in Moldova' fair; (ii) Wine School master classes; (iii) upgrading of the sommelier profession and wine services in HORECA, and (iv) the development of a partnership model between HoReCa and the wine producers.

Wine of Moldova at 'Fabricat in Moldova' fair. The Wine of Moldova has integrated the biggest fair of the 'Made in Moldova' products, organized the Moldovan Chamber of Commerce and Industry, between January 28th, 2015 – February 1st, 2015, at Moldexpo. The ONVV and CEED II have developed a tailored concept for the participation at this national fair, aiming to have a more up-scaled image, and differentiate from the other exhibitors within the fair. Consequently, a common open-space booth was organized, where 20 local wineries exhibited their wines and sold them at special prices. This presence was noticed by all visitors and special guests,

which appreciated the new approach and the qualitative presence of Wine of Moldova. Within the fair, the participants sold wines for about 500 thousand MDL (\$28,000), which showed a ratio of 5.6 p. for each \$ invested in the fair by Wine of Moldova.

The country brand gained more awareness among medium segment of the consumers, which are a new segment to be targeted and explored by national wines.

Wine School platform for wine culture master-classes. CEED II project continued to further develop the Wine School activities, aiming to promote the wine culture throughout ‘master classes’ and tastings. Five such master classes have been organized at the ‘Vinul Moldovei’ booth within ‘Fabricat in Moldova’ fair, attended by a total of 250 participants. Another master class, for about 50 francophone students, has been organized in the UTM tasting room, on February 20th, being moderated by Maitre Sommelier Leloup and the Moldovan Sommelier Nicolae Luca.



Figure 25. Wine of Moldova & Wine School at the National Fair 'Fabricat in Moldova' (Moldexpo, Chisinau).

Developed sommelier profession and upgraded wine services in restaurants. Between February 16 – 20, 2015, the CEED II project organized a complex program of activities called the “HORECA Wine Proficient Services’ Week”.

This program included several activity types, as follows: (i) the HoReCa wine services’ audit ; (ii) the European certification of Moldovan sommelier; (iii) the training of local sommelier; (iv) accreditation of the Moldovan Sommelier School to the standards of the European Sommelier Association; and (v) the development and launch of the Wine Friendly Restaurant Program.

The CEED II project organized these actions in collaboration with the ONVV, the Sommelier School and the Association of European Sommelier (ASE). The ASE deputy president, Maitre Sommelier Brigitte Leloup, has moderated the trainings, master classes and the restaurants’ audits, offering her services pro-bono, as contribution of the ASE to the Moldovan Sommelier profession.

In result of the “HORECA Wine Proficient Services’ Week” activities, the following results have can be reported:

- *HoReCa wine services audit* – 6 restaurants based in Chisinau received project support as their staff was offered wine service training conducted by Mrs. Brigitte Leloup. In addition, wine service in these 6 restaurants was audited by the European sommelier against some quality specifications, providing subsequent practical recommendations. For half a day, these restaurants benefited from the services of Mrs. Leloup, which were highly appreciated by the restaurants' owners, since all their staff members could participate, without leaving the restaurant location.



Figure 26. Master Sommelier Brigitte Leloup training the HoReCa staff in quality wine services

- *Certification of Moldovan sommeliers with the European Sommelier Diploma* – for the first time in Moldova, 13 local sommelier and wine professionals have been allowed to pass the exam for the European Sommelier Diploma. This was possible due to the long and fruitful collaboration between CEED II and the ASE, who has the mandate from the EU Parliament Commission for Wine, Beverages and Quality Food to award such diplomas, based on the European Professional Sommelier Standards. The examination has consisted of two parts: a written and the verbal test, under the supervision of an international jury, formed by 5 experts. The 13 candidates to the European Sommelier Diploma have all passed the exam and received the certification from the ASE. Out of the 13 sommelier, 6 are working in local restaurants and wine shops, 4 are employed by wineries with wine tourism services and the others are involved in Sommelier education programs and the ONVV staff.

Having the European certification of the local sommelier will positively impact on the attractiveness of this profession and will increase the demand for sommelier services on behalf of the restaurants, who ultimately will upgrade their wine service and increase wine consumption.



Figure 27. The first 13 Moldovan Sommeliers certified with the ASE European Diploma

- *Accreditation of the Moldovan Sommelier School to the standards of the European Sommelier Association* – the Moldovan Sommelier School of the Technical University of Moldova has received the coaching of the ASE on how to better organize the classes and the education program. The sommelier curricula, the teaching methods and materials have been analyzed against the European Sommelier Education Standards and the School director, Mr. Nicolae Luca has received ASE recommendations and suggestions on how to further improve the Sommelier Program. Additionally, the ASE has transmitted to the Moldovan Sommelier School all its teaching materials, handouts, presentations, and 4 books used as teaching guide for Sommelier courses in France. The general conclusion of the ASE accreditation was positive and the ASE concluded that the Moldovan Sommelier School can be allowed to organize courses and its graduates could be permitted to pass the exam for the European Sommelier Diploma, if the ASE recommendations will be implemented.
- *Wine Friendly Restaurant Program development and official launch* – the CEED II developed the concept for a new program called ‘Wine Friendly Restaurant’, meant to incentives partnerships between wine producers and the local restaurants, to upgrade the restaurants’ wine services and to promote the wine culture in the HoReCa channel.

The restaurants that will have proficient wine services will receive the award of ‘Wine Friendly’ (the logo&diploma) and will have the opportunity to participate in the HoReCa seasonal campaigns, such as : ‘Spring in Rose’, ‘Summer in White’ and ‘Autumn in Red’, supported by the ONVV and the wine producers. Also, these restaurants may receive the annual awards and prizes (oenomatics, wine fridges, etc.). An official presentation of the program and an invitation to enroll to it has been announced within a public event on February 20th, 2015, to which participated about 35 restaurant owners, who have expressed their interest to collaborate with the ONVV.



Figure 28. Wine Friendly Restaurant logo on the sticker showing that it is part of the program

The CEED II project is motivating the ONVV to implement the above activities annually and to continue to coordinate the Wine Friendly Restaurant program.

With support from CEED II project, the ONVV has developed the concept for a new event meant to develop the wine culture and the promotion of the wine products on the local market, ‘Salon Divin’. The event has been designed to support the PGI Divin (high quality brandies) to be promoted properly on the local market.

Activity 4. Continued support for the legal and regulatory reform in the wine industry

During the reporting period, the USAID CEED II project has offered support to the MAFI and the ONVV in continuing the legal®ulatory reform in the wine industry. The activities were focused on the following aspects (i) finding consensus on the draft of the Technical Regulation on the wine industry organization; (ii) developing new normative acts to ensure the enforcement of the new Law on Vine and Wine; (iii) reforming the product conformity procedures and the official control system; (iv) implementing the Concept on the Excellence Centre in Winemaking and Viticulture by the National College of Viticulture and Winemaking in Chisinau (CNVVC Excellence Centre).

Shortly after the new MAFI Minister, Ion Sula, was appointed, USAID CEED II representatives met him and agreed on the agenda of activities for the last three months of the project. In addition, the Minister was informed about the key priorities and problems of the sector and the USAID support. Minister Ion Sula highly appreciated USAID /CEED II activities and promised to offer his entire support in the future.

Consensus found on the PGI/PDO model and TR draft submitted to Government. With a complex support from the CEED II project and the USAID Moldova mission, ONVV and MAFI's wine policy department have managed to find a consensus and agreed on a draft of the Technical Regulation on the wine industry organization, which was sent to the Government on January 30th, 2015.

After two years of debate during which the Ministry's wine policy department was rejecting any compromise and proposals from the private sector and the ONVV, thanks to the facilitation from CEED II and Minister Bumacov, the two sides worked together and developed a final version that included the main proposals of the private sector, i.e. the management and organization of the PGI/PDO wine production system. Also, the authors have upgraded the TR chapter on product conformity assessment, based on the recommendations from the CEED II regulatory specialist, Nicolae Botan. The final version of the document was submitted to the Government for approval, once a new Government will be appointed by the Parliament.

New drafts of normative documents for the wine reform implementation. During the reporting period, CEED II supported ONVV in developing the drafts for new normative acts, designed to implement the reform of the wine legislation. Particularly, the draft Government Decisions regarding the Regulation on organoleptic assessment of wine products and the Concept on development of the Vine and Wine State Registry, have been drafted. The two drafts were submitted to MAFI for publication on their website and for public discussion.

Additionally, CEED II contracted a local legal consultant to develop the Government Decision on the Regulation of the Vine and Wine State Registry (VWSR), which is needed for the smooth implementation of the project on the development of the VWSR, financed by USAID and the Czech Agency for Development (CzDA).

Also, ONVV, with support from CEED II consultant, is completing the regulation on the use of the Wine of Moldova country brand, including the quality assessment and control.

In December 2014, the project responded to the ONVV's demand to provide assistance for upgrading the conformity assessment procedures and bringing them in line with the legislative reform principles. Consequently, an action plan was agreed with the director of the National Centre for Alcoholic Products testing and certification (CNVCPA) and a working group, formed by ONVV and private sector representatives, was created. CEED II contracted a local conformity assessment & regulatory consultant to assist the working group and to develop proposals and recommendations for the CNVCPA procedures and related regulations. Two sessions of the working group were held during December 2014 and it will continue in the first quarter of 2015.

Reforming the product conformity procedures. Following the working sessions of December 2014, in January 2015, CEED II regulatory consultant, Nicolae Botan, developed an assessment of the current certification procedures within the National Centre for Alcoholic Products' Quality Testing (CNVCPA), which included a set of problems and suggested recommendations. The draft paper was submitted to the MAFI working group and to CNVCPA for review and shall be used as a starting-point for continued implementation of the reformed Law on vine and wine.

As a result of this analysis, CNVCPA introduced some changes into its certification procedure, easing the access of producers to its services, decreasing the administrative burden and excluding the unnecessary paper work. These changes have been requested and motivated by the private sector and the CEED project more than 5 years ago, and the fact that they have finally started being implemented

shows that the reform is expanding and pushes for changes in the most conservative areas, such as the conformity assessment procedures.

Within the first reforming steps of the CNVCPA, the following requirements have been excluded: control of the wine delivery contracts; control of the wine label; presentation of the wine technological instruction – all these being contrary to the new Law on Vine and Wine, as they allowed additional controls by other controlling authorities.

At the initiative of CEED II project and the ONVV, Minister Sula convened a special commission to analyze the costs and obstacles related to the certification procedures, asking to reduce these tariffs in order to increase the competitiveness of wine products.

Additionally, CEED II contracted a legal®ulatory consultant, Nicolae Botan, to develop a White Paper for *Re-thinking Controls over the Wine Products: Towards to a 'Legal, Loyal and Fair' Wine of Moldova*". The new study will offer a solution on how to make wine products control more efficient in the light of the state public interests; less burdensome for the private sector; and with decreased impact on the wine products' costs.

Coordinating the implementation of the Concept on the CNVVC Excellence Centre. CEED II consultant has contracted Ion Sirbulet, a local consultant with relevant experience in wine industry engineering and project management, to act as a coordinator of the project related to the modernization of the College for Viticulture and Winemaking from Chisinau (CNVVC). The consultant assisted the working group created by the Ministry of Agriculture and Food Industry and the CNVVC director to better plan, coordinate and implement the activities set out in the reform Concept.

An action plan was developed and approved by the Minister of Agriculture and the coordinator submitted requests for the organization of a study visit to Austrian Winemaking and Viticulture from Klosterneuburg.

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

Marketing coaching program for new boutique wines and emerging small wineries. The Marketing Coaching Program (MCP) has been re-launched during the reporting period. The main objective was to increase the marketing capacities of the assisted enterprises, assist the emergence of new wine products, or enhance sales of the existing premium wine products. MCP is targeting mainly the small and boutique wine producers, the premium winemakers and the producers that invest in quality and terroir.

The Marketing Coaching Program has initiated assistance for new participants, small&boutique wine producers including: Gogu winery and Unicorn in the development of their marketing strategies and new products.

Asconi winery has asked CEED II project for support to bring its products in line with the requirements of their new export markets, the USA, China, and UK.

Equinox winemaker, Costia Stratan, has enrolled in the MCP with the purpose to develop the web-page for their high premium wines, in order to respond to the numerous requests from their fans and consumers.

The Association of Small Wine Producers (ASW), supported by CEED II, has submitted a selection of their best wines to the International Wine & Spirits Contest Chisinau-2015 and won 3 gold and 4 silver medals (Equinox, Crescendo wines and Molda-Vin). Additionally, ASW was helped by CEED II to purchase 4 special tables for BTL and trade activities for the local market, with the purpose of increasing sales and introducing consumers to the new wines produced by micro-winerries.

A5. Finance & Investment Activities

Activity 1: Support access to finance through special channels

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

In January, USAID and CEED II representatives organized meetings with the management of 3 institutions, Comertbank, Prime Capital and Rural Finance Corporation. The meetings were organized in connection with James Borger, DCA expert, visit to Moldova and focused on discussing the current achievements in implementing DCA activity in the institutions and their proposals on improving the DCA utilization.

During the discussions, Prime Capital mentioned that according to their analysis, the proposed modifications could significantly maximize the DCA utilization, having as a target to use the entire contracted amount.

Comertbank was also optimistic with serious intentions to maximize DCA utilization. During the discussions, the bank mentioned that, given Moldova's path to the EU, the expansion of "emerging industries" definition to include the "manufacturing industry" is very important. In addition, it was discussed that the expansion of the DCA to include agriculture and agribusiness would increase the competitiveness of agribusinesses on EU market, and if allowed to include this sector under DCA would be an additional incentive to increase DCA utilization. As a result of this discussion, Comertbank was advised to update their proposals letter including agriculture and agribusiness, so that all proposals are analyzed at the same time. Other existing types of USAID guarantee were also discussed within the meetings. Comertbank requested additional information on the portable guarantees that seemed of interest to the bank.

A meeting was organized with Rural Finance Corporation. RFC considered two options: to keep suspension of DCA agreement or to request its cancelation and ask for extension of contract's terms and DCA area. Following the last meeting on June 4, 2014, Marcel Tonu, RFC President mentioned that the situation at RFC has improved. RFC is in a good position, proven through its equity to debt ratio, which is 1:1, considered very good in banking terms (the situation in other financial institutions provided as examples is 1:6). The main challenge currently faced by RFC is the lack of resources, as the institution is now in the process of reimbursing a credit taken from World Bank (\$20M contracted in 2000 until 2013). Thus, currently RFC is looking to attract other investors/financers to cover the decreased amount of resources. RFC found several investors but all of them provide small amounts, thus the Corporation is looking for better potential investors. The RFC President, Marcel Tonu, asked if it's possible to suspend the contract cancellation and to extend the term of the Agreement and the coverage date by 2 years, as well as to include activities related to the production and processing of agricultural products as eligible. These proposals would come from the RFC if the Board accepts crediting other clients in addition to savings and credit associations. RFC was advised to include these proposals into an official email and submit it to USAID. During the meeting, it was also discussed about other existing USAID types of guarantee. RFC was interested to know more on the portable guarantees.

Following the January monitoring visits to the partner financial institutions, on February 9, 2015 CEED II prepared a monitoring visits follow-up memo. The memo was written to support financial institutions initiatives and help USAID to make a decision in this respect. The facts mentioned in the follow-up memo could be summarized as follows:

- *Comertbank* requested to (i) broaden the definition of "emerging industries" to include the "manufacturing industry", (ii) extend DCA area to agriculture and agribusiness, (iii) extend the time frame of DCA implementation and coverage date by 2 years at no subsidy costs, but

with a reduction in the facility size, and (iv) allow placing under DCA guarantee the loans combining the credit lines and loans for new clients to refinancing.

- *Prime Capital* proposed the following changes: (i) expand the definition of qualifying borrowers to include not only IT but also ICT and the related sectors, (ii) expand the guarantee to cover other categories of clients and (iii) extend the timeframe of DCA implementation by 2 years without modification of the coverage date.
- *Rural Finance Corporation (RFC)* considered 2 options: On February 4, 2015 the President of the Corporation submitted a letter communicating about their decision (i) to keep the contract suspended, which means that the loans placed under guarantee before the suspension are covered according to the contract, while the Corporation will not place any new loans under the guarantee, and (ii) to allow the unused guarantee amount to be relocated to other financial institutions.

The letters from financial institutions with their proposal were transmitted with the Follow-up memo to USAID for their final decision.

Initiative to increase access to finance for wine sector. New initiatives to increase access to finance were researched during the quarter. A first meeting took place in January 2015, with USAID DCA expert, James Borger at EIB “Filiere du Vin” office to discuss with the management the possibilities to help wine companies. February, CEED II organized a joint meeting with USAID, EIB “Filiere du Vin” and Sida representatives. The goal of the meeting was to gather all 3 counterparts in order to discuss and find solutions to help wine companies with insufficient collateral to access the EIB loans.

According to the current status of the credit line, EIB “Filiere du Vin” has unspent funds for credits in the wine sector. The available funds are all loan funds and there is a need of a guarantee mechanism to place these funds further. The project is intended for a short term – 3 years - and half of this term has already elapsed. Therefore, EIB is looking to create partnerships to motivate companies to invest in the wine sector. As EIB explained, there is a stringent need to put in place an efficient guarantees system, so that the viable companies willing to access the EIB funds would be able to access the loan guarantees at a reasonable cost, in an effective manner.

Since CEED II helps the wine industry develop and enhance its competitiveness and acts as an implementing partner for the DCA activity, the project linked USAID and EIB to meet with Sida representatives and to discuss possible ways of collaboration. Summarizing the main idea discussed, the parties came to the conclusion that, if DCA is implemented for a pilot project worth 1-2 million euro, the implementing process and the costs associated would be as follows: USAID – will provide the facility and perhaps some technical assistance with the implementation of the DCA program; Sida – will possibly provide the funds to cover the initial subsidy cost to open the guarantee, and EIB will come up with the required technical assistance. Before moving forward on this initiative, EIB should hold discussions with their contractor and Government partners to get approval on this initiative.

Activities to extend DCA implementation. On February 17, CEED II organized an introductory meeting with USAID and the Mayor’s Office representatives at USAID to discuss a possible collaboration through the issuance of municipal bonds. During the meeting, the following aspects were addressed: the Mayor’s Office investment portfolio, the municipality financing needs for implementing important projects, and the possible ways to support the Mayor’s Office in these initiatives in order to help the development of the capital city. Mrs. Eugenia Ciumac, Head of Financial Management Division, explained that the Mayor’s Office had a positive experience with such a financial instrument as promissory note, having succeeded to implement an important activity. Mrs. Veronica Herta, Head of the General Directorate for Finance, was interested to have further discussions on issuing municipal bonds and proposed to organize a meeting with Mayor Dorin Chirtoaca in March. It was decided that the next meeting will have a larger format, including Sida representatives, as during the discussions with USAID and CEED II, Sida showed its interest to collaborate on a joint activity aimed to support the Mayor’s Office in issuing municipal bond guarantees for a certain project.

B. Deliverables

During the reporting quarter, CEED II submitted the following deliverables per contract requirements:

Deliverable Name	Submission Date(s)
Quarterly Report, January-March 2015	April 15, 2015
Monthly Report, January 2015	February 12, 2015
Monthly Report, February 2015	March 13, 2015

SECTION II

Results and Impact

A. Quantitative Results

The table in Appendix I presents our progress to-date against the targets set for selected indicators. We are not reporting for all indicators as some indicators are only reported on an annual basis. For a complete description of our M&E system and indicator definitions, please refer to the revised project Performance Monitoring Plan, approved on October 29, 2014.

B. Quantitative Results

B1. Fashion Accessories Industry Results

- Seven new generation brands have emerged. With CEED II assistance 5 apparel companies (Portavita, Alina Bradu, Clasic Prim, Valeriu Brinza, Stanislav Garstea) and 2 jewelry companies (Natalia Maskvina and Marin' elle). built stronger and more recognizable fashion brands. The implementations of new brand image will consolidate the brand values, market positioning, and fundamental principles of company's identity. Marinelle and Natalya Maskvina successfully used the new brand identity during their participation at the international specialized expo Bijorcha, in Paris, France in January, 2015.
- Five companies launched their websites. 2 apparel companies (Sram, Lenicris) and 3 footwear and accessories companies (Hincu, Natalya Maskvina, and Marinelle) launched their websites. All 5 sites are functional and updated with information about companies and their collections.
- Local brands increased visibility through a common promotion campaign. 40 fashion brands from 38 fashion companies are participating in this edition of the campaign, including 7 new local brands, which joined the campaign for the first time - Maskvina, Marinelle, Raquette, Slavisa, Valenti, Mantimex and Polina Hasanova. This campaign continued to raise the awareness and pride of local consumers about local brands. In March, 2015, the number of followers of the Din inima page on Facebook increased to 12,000 as compared to 8,500 in July 2014.
- Local companies enhanced export capacity through exhibiting in specialized international shows and matchmaking assistance. CEED II helped local companies to participate at 9 international exhibitions:
 - 8 own brand apparel companies participated for the first time at the International fashion exhibition Central Asia Fashion. Participation at this exhibition was successful for Moldovan own brand apparel companies. They established 49 new contacts (Mobile – 14, Alert&Co – 8, Velitextil Plus – 5, Steaua reds – 3, Ionel – 3, Emilita Lux – 5, Odema – 5, and Premiera Dona – 6 contacts). Importantly, the company Bissini Textil International visited the Moldovan stand and was impressed by the collection displayed by Allert&Co and Mobile companies, making arrangement to visit these companies in Moldova in April.
 - 7 apparel companies (Mobile, Ionel, Tricon, Odema, Steaua reds, Velitextil Plus, and Saltoianca) participated at Zoom by Fatex international exhibition, which was successful. They established 28 new contacts.
 - 3 companies (Ionel, Mobile and Odema) prepared samples for foreign clients, based on which they started negotiations for future collaboration.
 - 5 apparel companies (Intercentre Lux, Odema, Saltoianca, Steaua Reds, and Infitextil) established 18 new contacts due to their participation at Textilegprom exhibition. Steaua Reds signed a new contract for 2015 with an existing client. Odema attracted a new client from Novgorod for school uniforms. Currently it holds negotiations with this client.

- 2 children wear manufacturers, Emilita Lux and Velitextil Plus, participated at the CJF-Child and Junior Fashion-2015 Spring Exhibition in Moscow, Russia. Due to its permanent participation, Emilita Lux attracted a new client and started discussions with it regarding the assortment, quantity and price.
- 7 footwear companies, Cristina, Tiras, Floare, Tighina, Oldcom, Rotan, and Vitalie Burlacu, participated at GDS – Global Destination for Shoes specialized international exhibition. Companies gathered more than 40 new contacts and are currently working to establish partnerships with them. Two big opportunities resulted from companies' participation in GDS: (i) Alpina Shoe, a Romanian company manufacturing for ZARA and ALDO (which is looking to source over 90,000 pairs in a neighboring region) appreciated Cristina's offer and decided to make a business trip to Moldova in March 2015 to establish collaboration with the Moldovan company and to visit other footwear manufacturers here; (ii) Deichmann Stores (a retail chain running thousands of stores) visited the Moldovan stand, looking for sourcing close to the market.
- 5 footwear and accessories producers - Oldcom, Tiras, Floare, Tighina and Tesner at the Leather & Shoes international fair in Kiev, Ukraine. At the same time, several companies managed to attract new clients: the handbag producer I. Tesner, selling the brand Maalex, acquired 5 new contacts, Tiras - 3 contacts with Ukrainian shoes retailers. Both companies are now in process of establishing cooperation liaisons with the new clients.
- 1 footwear company, Irka shoes, participated at Palas Leather Show exhibition in Iasi, Romania with its new spring collection.
- 3 Moldovan fashion accessories manufacturers - Ju-Bijoux, Marinelle, and Natalya Maskvina to exhibit their handmade collections to EU buyers at the emblematic Bijorka 2015 tradeshow in Paris. As result of participation at Bijorka exhibition in Paris, the jewelry producer Ana Popova received 17 new orders. After participation
- Moldovan designers acquired a new vision for developing new collections. As a result of CEED support, collections created by Moldovan companies producing and selling children's wear are now able to compete with products of foreign competitors on the local market, which has led to an increase in companies' sales. The correct breakdown of collections by style, color palette, size for target clients, and proper pattern design ensured the success of local collections in the fall 2014 season. Emilita Lux, Velitextil Plus, Zivax Maxi, Miss Vivien, and Lenicris apparel companies have sold out over 80% of their 2014 autumn/winter collections.
- Moldovan own brand companies increased sales due to design improvement and common promotion:
 - Ju-Bijoux increased its sales by 13% and exports - by 32% in Q 4 2014 as compared to Q4 2013.
 - Bitprogram increased its overall sales by 58% and exports - more than twice in Q 4 2014 comparing with Q3 2014.
 - Hincu increased its sales on the local market by 54 % in 2014 compared to 2013.
 - Zorile increased its sales by 39% in 2014 compared to 2013.
- One footwear company expanded sales on the European market. With CEED II support, due to the participation at Leather&Shoes international exhibition in Kiev, Ukraine in 2012- 2015, Oldcom footwear brand entered the EU market, delivering in March 2015 the first orders to Italy and Czech Republic.
- The first Center for Fashion startup designers (Center for Fashion and Technology Education and Acceleration) was started. The name and Logo (ZIP House), as well as the brandbook for proper usage thereof have been developed. The architecture and interior design of the Center was completed. The ventilation and air conditioning systems are in place. Negotiations with service providers for the vinyl floor covering; the wood furniture manufacturer; the installation of automatic fire alarm system; automation system for heating, ventilation and air conditioning; security system; access control system by card; video surveillance system; sound connection are underway.

B2. ICT Industry Results

- The first Robotics competition was successful organized. CEED II with ATIC and other partners organized the FLL Moldova competition, thus getting included in the list of around 100 countries, organizing FLL competitions. Local teams competed alongside with other 300 thousands of children from around the world. 60 children, representing 10 teams from 6 educational institutions participated at the event, 4 teams were awarded special prizes and the champion team (8 students) went to the FLL Estonia finals. They performed great at the Estonian competition and brought the 1st prize for the Robot design. The FLL Moldova competition had vast media coverage. Over 30 news articles and video/photo reports from the event were published in 19 local media, of which 7 TV channels.
- The new IDC report on the Competitiveness of the IT Services Industry. The presentation of the report findings took place on March 10, 2015, at the Ministry of ICT. Around 20 people attended the event, which attracted great media attention, several TV channels and news agencies covering it in their news blocks.
- Meeting the potential regional investor. The representative of Bulgarian Investment Fund LAUNCHub held a special meetup with around 50 young startappers and aspiring entrepreneurs on best practices on fundraising, followed by a series of one-to-one meetings with 8 startup teams, scouting for potentially investable startups.

B3. Tourism Industry Results

- Capacity of the National Inbound Tourism Association (ANTRIM) built. ANTRIM attracted 2 new members, and elected the new President and Vice-President, in February. During March, 3 events were organised by ANTRIM : a B2B event in Bucharest with 7 Moldovan winneries gathering 250 participants, a workshop on social media for 15 participants, and a working visit to Moldova of US Forest Service representatives.
- Moldovaholiday.travel improvements initiated. CEED II initiated the implementation of French and German languages, which will make the site more comprehensive and more accessible for visitors from target markets. Currently the website features the new tourism country brand- the Tree of Life.
- Three-month awareness digital campaign initiated. Three months awareness digital campaign was initiated. During the first 6 weeks of social media campaign, more than 345,000 people were reached and 2,392 new fans engaged.
- Moldova's first participation at the exhibition under the new country brand. CEED II supported a delegation of 2 companies to exhibit at Vakantiebeurs in Utrecht, the Netherlands. This was the first exhibition featuring the new tourism country brand- The Tree of Life.
- Moldovan tourism offer presented at the Ferrien Messe in Vienna and at EMITT in Istanbul. CEED II supported a delegation of 5 companies to exhibit at the Ferrien Messe in Vienna, Austria and 4 companies and NTA to exhibit at EMITT in Istanbul, Turkey. Awareness was raised and many personal contact have been established.
- Successful participation at ITB Berlin and press conference organization. CEED II supported 7 companies and NTA to exhibit at ITB in Berlin, Germany. On March 4, CEED II supported the organization of a press conference for the second time; the event was attended by 25 travel journalists and writers from German media. Awareness about the new tourism country brand was raised and many personal contacts were established.
- The tourism brandbook finalized. The brand book for the new tourism brand 'Tree of Life' was finalized, being prepared in 3 languages: Romanian, Russian, and English.
- Souvenir shop strategy developed and first line launched. On March 19, together with NTA and ANTRIM, CEED II organized the official launch of the first souvenir line, during a press conference. The same day, 3 "Tucano Coffee" cafes in Chisinau started to sell souvenirs with this brand. One week later, Vasconi apparel company started to sell branded t-shirts and bags.
- Brand licensing agreement underway. CEED II engaged a local legal company to help NTA find a mechanism of licensing the legal entities that would like to use the tourism Mark for

promotional and commercial purposes. These will develop Rules/Guidelines on the licensing rights to use the trademark, the trademark licensing agreement, to be entered into between the NTA, and the third party using the Mark for commercial and promotional purposes.

- Public policy initiative for hotel VAT reduction underway. CEED II supports NTA and the Hotel and Restaurant Association in the development of a public policy initiative to reduce the VAT for hotel services from 20 % to 9 % and supersede the current 5% perceived by local authorities by the 1 EUR local tax. CEED II engaged a local consultant. The document is planned to be finalized by the end of April and later on NTA will lobby it to the competent authorities.

B4. Wine Industry Results

- Streamlined job descriptions with the ONVV institutional responsibilities and management templates developed. The ONVV has been assisted by the CEED II consultants to consolidate institutionally and to increase efficiency of its business processes.
- Initiated the development of the ONVV 'intelligence mix' of services. At CEED II recommendations, the ONVV with support from CEED II and EIB projects' consultants has initiated the development of the industry intelligence & macro-economic appraisal and the marketing intelligence products;
- 25 interviews organized with the wine industry stakeholders. The interviews are part of the preliminary assessment of the ONVV institutional communication strategy, to be developed by CEED II project consultant. The interview allows to understand the industry's expectations and needs for ONVV services & products and to propose a subsequent communication toolkit for implementation.
- A quarterly PR & communication campaign implemented for Wine of Moldova and the ONVV. About 11 press releases, about 5 press events and about 85 press clippings, including TV, radio and written local media have been registered on the local market. In result of these PR activities, the ONVV has become a referenced institution in the field of the wine sector, and the wine industry has had a better exposure in the local press.
- The ONVV 2015 annual activity plan adopted by the Council for Coordination. ONVV has developed, with assistance from CEED II consultant, the activity plan and 2015 budget. About \$1, 200,000 have been planned for marketing activities (approx. \$900,000) and viticulture & winemaking supporting activities (approx. \$ 300,000).
- The ONVV 2014 annual report accepted by the by the Council for Coordination. The annual report has been developed with assistance from CEED II wine industry manager and was approved by the ONVV board. The ONVV has used in 2014 a marketing budget of about \$ 450,000, while the total ONVV expenses budget for 2014 has been of \$ 800,000.
- Increased ONVV role and improved advocacy role. With support from the CEED II project, the ONVV succeeded to improve its advocacy activities. Consequently, the ONVV promoted wine industry proposals for subsidies, managed to obtain a consensus from MAFI on the draft Technical Regulation on the wine industry and initiated proposed new normative documents for approval.
- Technical Specifications on the IT solution for the electronic keeping of the wine registries developed by CEED II consultant. The implementation of such an IT solution in the wineries will ease their internal procedures, reduce costs and offer modern and efficient tools of business management. The ONVV will implement this as a 'software as a service' model. The tender for the software development will be released in April 2015.
- Increased interest of Estonian wine importers at the "Wine of Moldova Vernissage in Tallin". About 80 wine importers and distributors, around 30 local journalists and Estonian politicians have attended the "Wine of Moldova Vernissage in Tallin", on February 19th, 2014. The 17 Moldovan wineries have discussed new partnerships and contracts with the local partners. Et Cetera winery has signed a new contract with an Estonian importer and has received the order for the first wine delivery. Other 3 wineries, Castel MIMI, Bostavan winery and Chateau Vartely have also received express of interest for their premium wines. A 2 pages article on Moldovan wines has been published in an Estonian journal.

- Successful second appearance of Wine of Moldova at ProWein 2015 (Dusseldorf, Germany). The Wine of Moldova was successfully showcased at ProWein exhibition in Dusseldorf (Germany), the biggest international specialized trade fair in Europe. The ONVV implemented a complex program of activities, managing to increase impact of the Moldova's participation at the fair : a PR campaign targeting about 3,000 wine professionals and dozens of wine media; a twice bigger booth as a national platform; respectful utilization of the brandbook and impressive stand design; efficient POS materials (tasting book, bags, neck-hangers, etc.). CEED II project contributed directly to this success, as it has closely monitored the implementation of this activity and its compliance with the Marketing&Promotion Framework and the previous best practices.
- 5 master classes with guided tasting of 25 Moldovan wines conducted by an American Master of Wine. The famous US Master of Wine, Christy Canterbury, contracted by CEED II project has commented the Wine of Moldova to about 65 wine importers, journalists and sommeliers which attended the master classes. In result of the master classes an article on Moldovan wines has been published by the President of the Indian Wine Academy, the famous wine writer Robert Joseph, and other wine professional visited the stand and met the wine producers.
- New business opportunities and expanded sales on EU market in result of ProWein 2015. The 27 wineries and 3 small wine producers, which participated to ProWein 2015 have declared an increased interest to Moldovan wines at this trade fair, comparing with the previous editions. The participants earned more than one hundred new business contacts, had about 60 business meetings and some 25 new contracts for wine delivery in European Union will be signed in result of ProWein. Chateau Vartely, Et Cetera, Migdal P, Vinaria din Vale, Cimislia wineries- have all had new orders for additional wine volumes to be shipped in EU market during the 2015 season.
- A four pages editorial on Wine of Moldova drafted for publication in Decanter magazine. CEED II project will sponsor the publication of a four-pages' editorial on Moldovan wines in one of the most reputed wine journal in the world – Decanter magazine. The famous British Master of Wine, Caroline Gilby, a connoisseur of Moldovan wines and editor of major wine journals, has been contracted by CEED II and will be writing the article on Wine of Moldova.
- A Czech and Polish marketing agency have been identified to implement marketing & trade campaigns in target markets. The ONVV, assisted by CEED II consultant, Marco Tiggelman has organized an international tender to contract services of a European marketing & PR agency to implement a PR & trade activity on Czech and Polish markets. Simultaneously, CEED II has launched a RFQ on the local market to develop the campaign toolkit and creative content. These campaigns shall be initiated in May 2015.
- Sales of about 500 thousands MDL at 'Fabricat in Moldova' fair in Chisinau. A common open-space Wine of Moldova booth was displayed, where 20 local wineries exhibited their wines and sold them at special prices. The qualitative presence of Wine of Moldova increased brand awareness and promoted the wine culture to about 6 thousands visitors of the fair.
- 6 Chisinau restaurants audited as Wine Proficient Services – The ASE vice-president, Maitre Sommelier Brigitte Leloup has held half-day trainings on quality wine service in restaurants to the staff of these 6 restaurants and audited their services and making appropriate recommendations. About 100 persons, mostly young waiters and staff, have received high profile education in wine service. The 6 restaurants have been proposed for the 'Wine Friendly Restaurant' award.
- 13 Moldovan professionals certified with the ASE European Sommelier Diploma. The 13 candidates have passed the written and verbal exam and received the certification from the ASE. The diploma is recognized by the EU Parliament Commission for Wine, Beverages and Quality Food and the Association of European Sommeliers (ASE). This activity will also positively impact on the attractiveness of the sommelier profession and will increase the demand for such services, ultimately upgrading the wine culture.
- The Moldovan Sommelier School accredited to the standards of the European Sommelier Association – the Moldovan Sommelier School of the Technical University of Moldova has

been coached by the ASE on how to better organize the classes and the education program. The sommelier curricula, the teaching methods and materials have been accredited against the European Sommelier Education Standards. Additionally, the Sommelier School received access to all ASE's teaching materials, handouts, presentations, and CEED II project purchased 4 professional books for its program.

- Wine Friendly Restaurant Program conceptualized and publically launched. CEED II wine industry manager developed the concept for a new program called 'Wine Friendly Restaurant', meant to incentives partnerships between wine producers and the local restaurants, and presented it to the ONVV for implementation. About 35 restaurants have attended the official launching event and expressed interest in this program.
- The Technical Regulation on the wine industry organization sent to Government for approval. The adoption of this new normative act will bring the legislative reform to the implementation into winemaking and viticulture practices, making it real for every wine industry actor, will ease and streamline the production rules, harmonizing with the EU practices and quality requirements; will clarify traceability requirements and lay out the basis for the PGI/PDO production system.
- Two new Government decisions developed for the wine reform implementation. The Regulation on the Regulation on the organoleptic assessment of wine products and the Concept of the development of the Vine and Wine State Registry have been developed and initiated for approval. These documents will modernize the current procedures and contribute to expanding the wine sector reform.
- An assessment of the current certification procedures within the National Centre for Alcoholic Products' Quality Testing (CNVCPA) developed. The document included a set of problems and suggested recommendations and served as a argument for the Minister Sula to settle a working group for the simplification and reduction of certification costs.
- Eased, streamlined and adjusted CNVCPA certification procedure to the wine law reform. Within the first reforming steps of the CNVCPA has been convinced by CEED II wine industry manager and consultant to exclude some obsolete requirements: control of the wine delivery contracts; control of the wine label; presentation of the wine technological instruction – all these being contrary to the new Law of Wine and Vine, as these submitted to additional controls on behalf of other controlling authorities.
- An action plan approved by the MAFI Order for the implementation of the Concept on the CNVVC Excellence Centre. With support from the project coordinator, contracted by CEED II project, the MAFI working group approved an action plan in line with the CNVVC reform concept. Also, the EIB 'Filierie du Vin' program has submitted a request for a 3.5 million EUR credit for the CNVVC reconstruction.
- Two new small wine producers assisted to develop their new wine products within the MCP. The small&boutique wine producers: Gogu winery and Unicorn are enrolled in the MCP for the development of their marketing strategies and new products. Their launch on the market will increase the quality of the Moldovan wine offer locally and internationally.
- 3 gold medals and 4 silver medals awarded to the small wineries, Equinox, Crescendo and Molda-Vin at the International Wine & Spirits Contest Chisinau-2015. These awards will increase notoriety and credibility to these wines and help sell them at appropriate prices.

B5. Finance & Investment Activities Results

- Ongoing assistance to USAID DCA Guarantee Partners was provided. CEED continued its communication with and provided advice to financial institutions implementing the DCA activities.
- Three meetings with DCA partners successfully organized. The main purpose of the visits was to discuss the proposals for improve DCA utilization included in the letters that financial institutions submitted to USAID. As result, a follow-up document was prepared by CEED II and sent to USAID to help take a decision in this respect.

- *A new initiative to increase access to finance were researched.* Several meetings with USAID, EIB “Filiere du Vin” and Sida representatives were organised for a possible USAID-BEI-Sida collaboration on guarantee to help wine companies with insufficient collateral to access the EIB loans, using DCA mechanism.
- *A introductive meeting with City Hall representatives was organised.* It was discussed the possibility to issue municipal bond and have a DCA guarantee. It was decided that the next meeting will have a larger format, including Mayor and The City Hall will select several projects for future discussions.

SECTION III

Planned Activities (April– May 2015)

The following activities are planned for the next quarter. Majority of activities were introduced in CEED II's Year 5 Work Plan; some activities are new. For activities requiring an outlay of external resources, i.e. CEED II short-term consultants and/or funds from the Sector Enhancement and Enterprise Development (SEED) Fund, an activity plan that summarizes the purpose of the activity, the rationale and justification for it, the expected results, the roles, responsibilities, and anticipated cost-share of each party involved, and the timeframe for the activity has been developed by the CEED II advisor responsible for the activity. Scopes of work are developed for consultants as needed.

A. Fashion Industry

- Monitor the Spring 2015 promotional campaign and assist APIUS in monitoring Din inima campaign;
- Finalize the construction work and the installation of the ventilation and air conditioning, heating, water and waste, fire alarm systems etc. for CFTEA;
- Subcontract the service providers for equipment, CAD system and TV sets and purchase them.

B. Information Technology (IT) Industry

- Continue the support to the Robotics program and develop the Robotics curriculum;
- Finalize the design concept, strategic plan and branding of the Excellence Center;
- Organize the Moldova ICT Summit;
- Continue the support to ATIC and finalize the Legal Pocket Guide and the ICT Companies catalogue.

C. Tourism Industry

- Approve the marketing and promotion plan for the Tourism industry by NTA;
- Support the organization of first International Tourism Forum;
- Launch the promotion campaign at the airport;
- Finalize the promotional campaign for Moldovaholiday.travel and social media;
- Support the organization of the familiarization tours;
- Support the launch of souvenir shops in 5-8 locations;
- Finalize the brand licensing agreement.

D. Wine Industry

- Assist ONVV to develop and approve the Activity plan for 2015;
- Support the ONVV in the putting in place of the wine country brand accreditation procedures for wineries and the agreement of their wines into the program Wine of Moldova.
- Support the ONVV in developing the wine tasting procedures for the certification and product assessment.
- Development of the Technical specifications and tender documents for the development of an IT solution for the technological wine registries;
- Assist the ONVV to contract an developer for the monitoring and evaluation (M&E) electronic database;
- Support the ONVV in the set-up of the appropriate procedures according to the technical specifications of each PGI/PDO;
- Finalization of the design activities for Wine of Moldova marketing materials.

- Assist ONVV in the development of the marketing&promotion campaign for the local market, especially for the HORECA segment.
- Support ONVV in the planning of the promotion activities on target markets and their implementation accordingly to the Annual Wine of Moldova marketing plan for 2015;
- Assist ONVV in organizing the participation at the ProWein Dusseldorf 2015.
- Plan and organize the implementation of the “Wine of Moldova Vernissage” concept in Czech Republic and Romania.
- Assist the ONVV in organizing business & marketing intelligence services for the wine industry;
- Organize trainers of trainers for the sommelier instructors and prepare them to be accredited to release European Sommelier Certificates, under the ASE.
- Develop recommendations and guidelines for a reformed certification procedures;
- Develop an audit for the public controls and certificates within the wine industry;
- Organize a study visit for the representatives of the official controlling bodies to an European wine country;
- Support MAFI and ONVV to develop a roadmap for the development of a new Wine sector strategy.
- Further continue organizing support to the emergence of new small &boutique wines producers throughout the Marketing Coaching Program.
- Support ONVV in implementing its activity plan for 2015 and prepare exit of the project supported activities.

E. Finance and Investment

- Provide ongoing support to DCA partners.

SECTION IV

Technical and Administrative Support

A. Project Communications

General. Throughout the reporting period, the project’s communications advisor undertook among others the following actions to spread the word on CEED II activities using the most effective communication channels based on fruitful collaboration with media representatives, project stakeholders, partners and to ensure the compliance with the USAID project branding and marking requirements.

- Maintained and updated the project website (www.ceed.md) in English and Romanian versions as well as the USAID CEED II Facebook page which had 2,300 “Likes” by the end of March 2015.
- Ensured that branding and marking guidelines were respected during technical events, local and international publications, and promotional/media campaigns/activities in CEED II target industries (e.g., participation of Moldovan apparel, footwear and accessories companies at international exhibitions, Wine Friendly Restaurant Program launch, FLL/Robotica contest, IDC Study press conference, Din inima Fashion Weekend & promotional activities, Wine of Moldova in Dusseldorf activities, Moldova Tourism Brand promo activities in Moldova & abroad, and other activities.
- Throughout the related period, CEED II regularly submitted its “calendar of activities” to USAID for inclusion on the Mission website, USAID Regional Mission to Ukraine, Belarus and Moldova Bi-Weekly ReCap and other info outlets as appropriate.
- Analytical article that highlights the success of the USAID CEED and CEED II projects in shifting Moldovan apparel and textile industry from C&M to higher value added “Industry Performance” was published in March 2015 issue of Profit magazine.
- Maxi Kids success story was worked on and submitted to the USAID Mission for clearance. Video success story that highlights the project IT Essentials (ITE) initiative success has been finalized. The first person success stories on the support to small handmade jewelry producers (Anna Popov) and employment in Butuceni region are in progress.

Media coverage. During reporting period, CEED II activities were regularly highlighted by the mass media, including:

- over 8 times in print media (publications in Logos Press, Profit/Finante & Banci, Ziarul National, Brandemia, Spain, Hufvudstadsbladet magazine, Sweden, etc.);
- 340 times in electronic media (Infotag news agency daily news bulletin, news/articles, press releases rubrics, Koren.nova.cz, Czech Republic, Allaboutshipping.co.uk, UK, www.allMoldova internet news portal, www.agora.md, www.allfun.md, www.agrobiznes.md, www.diez.md, www.infomarket.md, www.locals.md, www.madein.md, www.unimedia.md, www.moldovenii.md, www.moldova.org, www.noi.md, MyBusiness.md, Spiegel.de SPIEGEL ONLINE REISE/Germany, www.dolce.vita, www.fashionguide.md, www.ziarilelive.ro, www.topstiri.com, http://moldova-today.com, ITMoldova.com, Ziarul de garda, www.diez.md, www.perfecte.md, www.mtic.md, www.moldpres.md, www.alllady.md, www.mamaplus.md, www.presedinte.md, www.adevarul.md, etc.);
- 50 times on local and international TV channels (Acasa TV, ProTV, Publika TV, Prime TV, TRM, Jurnal TV, Koren.nova.cz, TV Czech Republic, Canal 2, Canal 3, TV 7, Euro TV, N4, etc.), and
- 5 times on the radio stations.

See Appendix II for the list of selected publications and other communications products and media outlets for the period of January – March 2015.

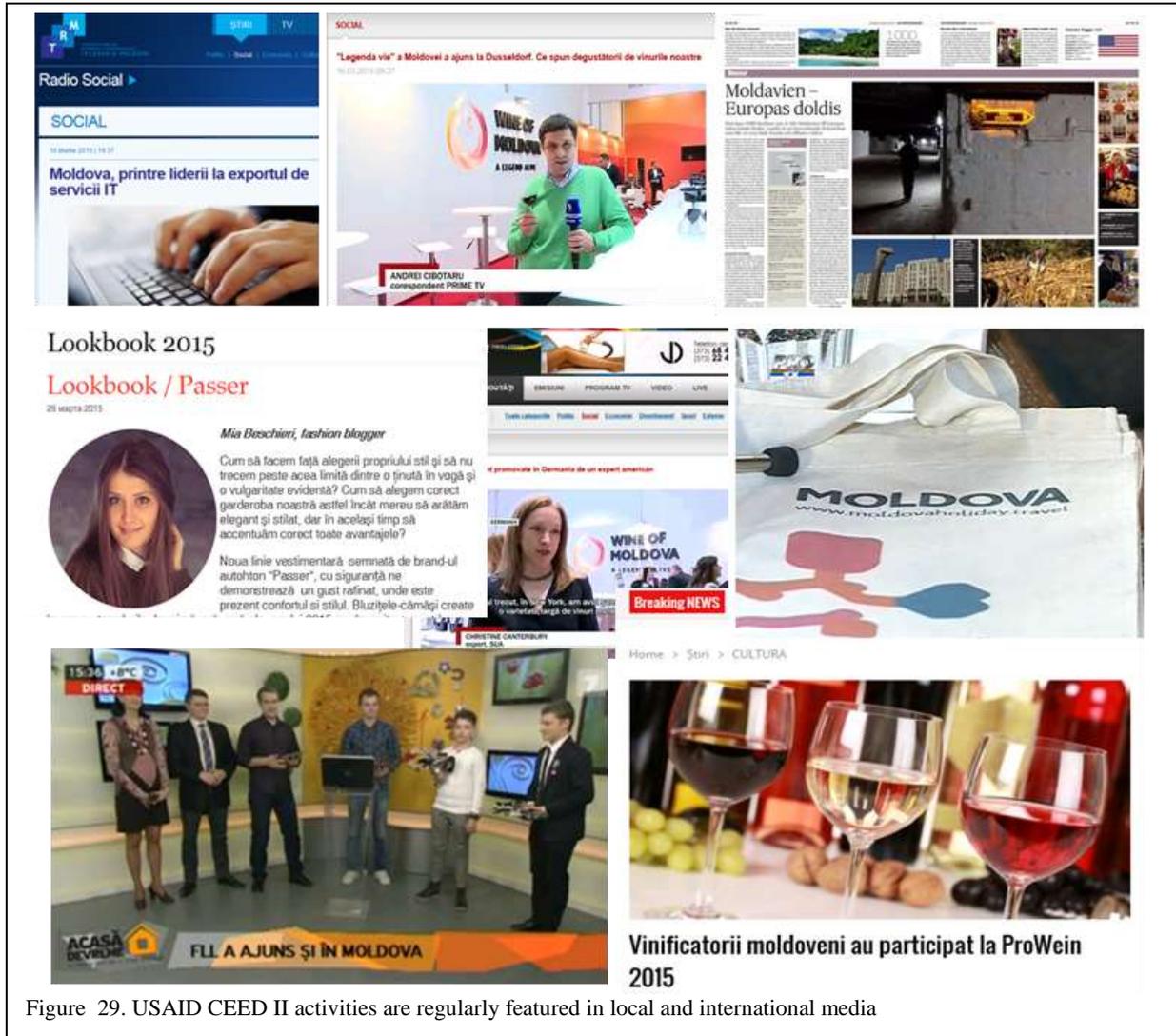


Figure 29. USAID CEED II activities are regularly featured in local and international media



Figure 30. "Industry Performance" analytical article that highlights the USAID CEED II's effort in shifting Textile & Apparel industry to higher value added published in Profit magazine (March issue 2015)



Figure 31. The video success story that reflects on the project's efforts in implementing the ITE initiative in Moldova has been finalized and USAID- branded.

B. Monitoring & Evaluation

Due to the fact that CEED II project was extended from December 2014 to June 2015, some updates to the M&E database were conducted during the current quarter, in order to allow tracking information for the extended period.

The project staff collected data from beneficiaries and other counterparts for the quarterly 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, in order to synchronize two CEED II indicators' names (indicators 3 and 7) with their names in USAID PMP, CEED II project adjusted the indicators' names. Thus, the name of the indicator 3 changed from "Enterprises receiving project-related assistance to improve their knowledge, processes, and technologies" to "Number of Firms Receiving USG Supported Assistance to Improve Their Management Practices"; the name of the indicator 7 changed from "Participants in project-related trainings or capacity building programs" to "Number of Persons Participating in USG-funded Workforce Development Programs". The quarterly data provide these indicators under the new name.

C. Administration and Finance

The project's administrative and financial systems are running smoothly. CEED II's Finance and Administrative Manager is duly performing her duties.

While there are no personnel changes in CEED II team from Moldova, there is a personnel change in CEED II PMU in Chemonics' home office: Krista Vogt, PMU Manager, took a six-month leave from Chemonics starting February; her position was taken by Eirene Buza.

APPENDIX I

Performance Monitoring Plan: Target vs. Actual

Indicators	Target Y1	Actual Y1	Year 1 Actual vs. Target	Target Y2	Actual Y2	Year 2 Actual vs. Target	Target Y3	Actual Y3	Year 3 Actual vs. Target	Target Y4	Actual Y4	Year 4 Actual vs. Target	Target Y5	Actual Q1 fr Y5	Actual Q2 fr Y5	Targets Y1-Y4	Adjustment of 4 years targets	Target Y5	Targets Y1-Y5	Actual Y1-Y5	Actual vs. Targets
	1	2	3=2-1	4	5	6=5-4	7	8	9=8-7	10	11	12=11-10	13	14	15	16=1+4+7+10	17	18=13	19=16+17+18	20=2+5+8+11+14+15	21=20-19
01A. Increased sales of assisted enterprises (sales change)	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%	Data reported annually	Data reported annually	10.00%	N/A	10.00%	10.00%	22.65%	12.65%
01B. Increased sales of assisted enterprises (new sales)	10.00%	53.43%	43.43%	10.00%	43.88%	33.88%	10.00%	39.16%	29.16%	10.00%	53.61%	43.61%	10.00%	Data reported annually	Data reported annually	10.00%	N/A	10.00%	10.00%	47.52%	37.52%
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%	7.50%	Data reported annually	Data reported annually	15.00%	N/A	7.50%	15.00%	32.66%	17.66%
Objective 1: Productivity of targeted industries increased																					
Expected Result 1.1: Use of improved technologies and business processes within target industries increased																					
03. Number of Firms Receiving USG Supported Assistance to Improve Their Management Practices	50	73	23	85	129	44	70	41	-29	15	55	40	8	11	44	220	77	8	305	353	48

04. Assisted enterprises applying improved knowledge, processes, and technologies	35	19	-16	55	115	60	45	44	-1	25	50	25	5	9	22	160	65	5	230	259	29
05. 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%	6.00%	Data reported annually	Data reported annually	4.25%	N/A	6.00%	4.60%	17.46%	12.86%
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%	22.09%	12.09%	10.00%	1.03%	-8.97%	10.00%	Data reported annually	Data reported annually	10.00%	N/A	10.00%	10.00%	11.30%	1.30%
07. Number of Persons Participating in USG-funded Workforce Development Programs	700	1357	657	1000	3422	2422	1650	3987	2337	1650	3546	1896	500	2297	267	5000	7300	500	12800	14876	2076
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	10.00%	30.43%	20.43%	15.00%	47.27%	32.27%	20.00%	44.44%	24.44%	25.00%	50.00%	25.00%	30.00%	Data reported annually	Data reported annually	17.50%	N/A	30.00%	20.00%	43.04%	23.04%
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	8	8	35	220	12	8	240	295	55

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%	N/A	N/A	N/A	20.00%	N/A	N/A	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	0	6	25	160	0	0	160	179	19
13. 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	50	167	196	100	950	50	1100	1472	372
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%	-32.34%	5.00%	Data reported annually	Data reported annually	10.00%	N/A	10.00%	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	5	Data reported annually	Data reported annually	125	N/A	5	130	189	59
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. Association s or member-based organizations demonstrating increased leadership in targeted industries	4	11	7	4	8	4	2	1	-1	0	3	3	0	0	0	10	13	0	23	23	0

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%	Data reported annually	Data reported annually	10.00%	N/A	10.00%	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%	65.00%	Data reported annually	Data reported annually	57.50%	N/A	10.00%	65.00%	92.00%	34.50%
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	50	368	41	300	470	50	820	1320	500
20. Policy or position papers published or commissioned by assisted associations or member-based organizations	5	9	4	10	11	1	10	10	0	10	11	1	1	2	1	35	4	1	40	44	4
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	4	6	5	50	1	4	55	68	13
22. Government actions taken that improve the business environment in targeted industries	5	8	3	10	10	0	10	10	0	5	9	4	1	2	2	30	6	1	37	41	4

APPENDIX II

CEED II Media Coverage during January – March 2015

Title of media product	Media Outlet/link	Date/issue
L'Ame de Femme sau sufletul unei femei puternice	https://mamaligadevarsovia.wordpress.com/2015/01/08/l-ame-de-femme-sau-sufletul-unei-femei-puternice/	Jan 8, 2015
Koření - Největší vinařské sklepy	Koren.nova.cz, Czech Republic http://koreni.nova.cz/clanek/novinky/nejvetsi-vinarske-sklepy.html	Jan 2015
Moldavia tiene nueva marca turistica, by Modesto Garcia	Brandemia, Spain	Jan 2015
Moldavien- Europas doldis, by Kicki Lind	Hufvudstadsbladet magazine, Sweden	Jan 2015
London lends tourism impulse for 'off the beaten track' Moldova	Allaboutshipping.co.uk, UK http://www.allaboutshipping.co.uk/2015/01/08/london-lends-tourism-impulse-for-off-the-beaten-track-moldova/	Jan 8, 2015
Republica Moldova ca destinație turistică a revenit pe piața din Olanda	Turism.gov.md/Noutăți și evenimente rubric	Jan 14, 2015
Launch of Moldova Tourism brand abroad		
Logo-ul turistic al Moldovei, prezentat pentru prima dată la o expoziție din Olanda	Unimedia.md http://unimedia.info/stiri/foto-logo-ul-turistic-al-moldovei--prezentat-pentru-prima-data-la-o-expozitie-din-olanda-87096.html	Jan 15, 2015
Logo-ul turistic al Moldovei, prezentat pentru prima dată la o expoziție din Olanda	Unimedia.md http://unimedia.info/stiri/foto-logo-ul-turistic-al-moldovei--prezentat-pentru-prima-data-la-o-expozitie-din-olanda-87096.html#.VLzKO8MKtml.facebook	Jan 15, 2015
Noul brand turistic al moldovei a fost lansat în Olanda	Viza.md http://www.viza.md/content/noul-brand-turistic-al-moldovei-fost-lansat-%C3%AEn-olanda	Jan 19, 2015
Noul brand turistic al Moldovei a fost lansat în Olanda	Moldovenii.md http://www.moldovenii.md/md/news/view/section/16/id/14146	Jan 19, 2015
Noul brand turistic lansat în Olanda și Austria	Infotag Agency website http://www.infotag.md/press_release-ro/198211/	Jan 20, 2015
Noul brand turistic lansat în Olanda și Austria	MyBusiness.md http://mybusiness.md/ro/categories/item/2712-noul-brand-turistic-lansat-in-olanda-si-austria	Jan 21, 2015
Moldova a prezentat în Olanda și Austria noul său brand turistic	Noi.md, Societate rubric http://www.noi.md/md/news_id/54790	Jan 21, 2015
Молдавское «древо жизни» - в американском Интернет-магазине	MyBusiness.md http://mybusiness.md/categories/item/2730-moldavskoe-drevo-zhizni-v-amerikanskom-internet-magazine	Jan 25, 2015
«Вино Молдовы. Живая легенда» на выставке «Сделано в Молдове»	MyBusiness.md http://mybusiness.md/categories/item/2742-vino-moldovy-zhivaja-legenda-na-vystavke-sdelano-v-moldove	Jan 28, 2015
Landunterkünfte in der Republik Moldau: Aus Alt mach Öko	Spiegel.de SPIEGEL ONLINE REISE http://www.spiegel.de/reise/europa/moldawien-nachhaltiger-urlaub-in-dem-oekodorf-butuceni-a-1007959.html	Jan 29, 2015
Скандинавская весна	Dolce vita/Fashion & Beauty rubric	Feb 4, 2015
USAID, IBM și Microsoft – partenerii R. Moldova în realizarea unui proiect	Provincial.md http://provincial.md/actual/usaibm-si-microsoft-partenerii-r-moldova-in-realizarea-unui-proiect-care-va-fi-rezultatul	Feb 5, 2015
Vinul Moldovei a cucerit admirația vizitatorilor la expoziția „Fabricat în Moldova”	MyBusiness.md http://mybusiness.md/ro/categories/item/2781-vinul-moldovei-a-cucerit-admiratia-vizitatorilor-la-expozitia-fabricat-in-moldova	Feb 6, 2015

Commercial platform for Moldovan brands	Logos Press newspaper	Feb 6, 2015
"Fabricat în Moldova": Vinificatorii au vândut produse în sumă de 200 mii de lei	Noi.md/Economie rubric http://www.noi.md/md/news_id/55882?utm_source=twitterfeed&utm_medium=facebook	Feb 7, 2015
Европейский вектор молдавских производителей обуви/ Vector european al producătorilor de încălțăminte din Republica Moldova	MyBusiness.md http://mybusiness.md/categories/item/2836-evropejskij-vektor-moldavskih-proizvoditelej-obuvi http://mybusiness.md/ro/categories/item/2837-vector-european-al-producatorilor-de-incaltaminte-din-republica-moldova	Feb 18, 2015
Participation of Moldovan apparel & fashion accessories producers at international exhibitions related		
Trei designeri autohtoni și-au prezentat noile colecții de bijuterii la Paris	Fashion Guide: http://fashionguide.md/blog/fashion/news/designer-ul-de-bijuterii-ana-popova-si-a-prezentat-noua-colectie-primavara-vara-2015-la-paris-foto.html	Feb 11, 2015
Тема: Trei meșterițe din Moldova au stârnit admirația specialiștilor la o expoziție internațională de la Paris	Allfun.md http://allfun.md/article/40498	Feb 23, 2015
Vectorul european al producătorilor moldoveni/ Европейский вектор молдавских производителей	Noi.md/Business rubric http://www.noi.md/md/news_id/56879 http://www.noi.md/ru/news_id/56879	Feb 25, 2015
Новые коллекции одежды из тканей европейского качества/ Colecții noi de îmbrăcăminte din stofe de calitate europeană	Noi.md//Business rubric http://www.noi.md/ru/news_id/56887#close http://www.noi.md/md/news_id/56887	Feb 25, 2015
Mai mulți producători din Moldova vor lansa colecții noi de îmbrăcăminte din stofe europene	agora.md http://agora.md/stiri/6482/mai-multi-producatori-din-moldova-vor-lansa-colectii-noi-de-imbracaminte-din-stofe-din-europa	Feb 28, 2015
Wine Friendly Restaurant Program launch related		
Somelieri din Franța au venit la Chișinău	Agrobiznes.md http://agrobiznes.md/somelieri-din-franta-au-venit-la-chisinau.html	Feb 17, 2015
ONVV a lansat programul „Wine Friendly Restaurant” (Ro & Ru)	MyBusiness.md http://mybusiness.md/ro/categories/item/2845-onvv-a-lansat-programul-wine-friendly-restaurant	Feb 19, 2015
Proiect destinat restaurantelor pentru promovarea vinului moldovenesc	Ziarelive.ro http://www.ziarelive.ro/stiri/proiect-destinat-restaurantelor-pentru-promovarea-vinului-moldovenesc.html	Feb 20, 2015
Proiect destinat restaurantelor pentru promovarea vinului moldovenesc (Ro & Ru)	Noi.md http://noi.md/md/news/56595	Feb 20, 2015
Noutatile din industria vinicola, la EXPOVIN 2015	Publika TV/ Tara lui Dogaru show http://www.publika.md/editie/391_3505981.html	Feb 20, 2015
Proiect destinat restaurantelor pentru promovarea vinului moldovenesc	TV 7 http://www.tv7.md/ro/economic/proiect-destinat-restaurantelor-pentru-promovarea-vinului-moldovenesc/	Feb 20, 2015
A fost lansat „Wine Friendly Restaurant” programul de promovare a vinurilor autohtone în restaurantele locale	http://unimedia.info/stiri/a-fost-lansat-programul-wine-friendly-restaurant-89035.html	Feb 20, 2015
Proiect destinat restaurantelor pentru promovarea vinului moldovenesc	Topstiri.com http://topstiri.com/ultimele-stiri/1880-proiect-destinat-restaurantelor-pentru-promovarea-vinului-moldovenesc.html	Feb 20, 2015
A fost lansat „Wine Friendly Restaurant” programul de promovare a vinurilor autohtone în restaurantele locale	Madein.md http://madein.md/news/evenimente/a-fost-lansat-wine-friendly-restaurant-programul-de-promovare-a-vinurilor-autohtone-in-restaurantele-locale	Feb 20, 2015
Proiect destinat restaurantelor pentru promovarea vinului moldovenesc	totul.md http://totul.md/ro/newsitem/688704.html	Feb 20, 2015
Oficiul Viei din Moldova a lansat programul „Wine Friendly Restaurant”	infoalment.ro Romania http://www.infoalment.ro/articol_3469-oficiul+viei+din+moldova+a+lansat+programul+wine+friendly+restaurant.html	Feb 24, 2015

FLL contest related		
Competiția "First Lego league" va avea loc în premiera în RM	Allfun.md/News Mix rubric http://allfun.md/article/40746	Mar 3, 2015
<i>Premieră: În Moldova se va desfășura competiția FIRST LEGO League</i>	Diez.md/Stirili curente http://diez.md/2015/03/04/premiera-in-moldova-se-va-desfasura-competitia-first-lego-league/	Mar 4, 2015
FIRST LEGO League, cea mai importantă competiție în domeniul tehnologiei și roboticii, se va desfășura, în premieră, în Republica Moldova pe data de 7 martie.	Moldova today: http://moldova-today.com/first-lego-league-in-moldova/	Mar 4, 2015
În premieră în Moldova – FIRST LEGO League, cea mai importantă competiție în domeniul roboticii	Agora.MD http://agora.md/stiri/6618/In-premiera-in-moldova-%E2%80%93-first-lego-league---cea-mai-importanta-competitie-in-domeniul-roboticii	Mar 5, 2015
În premieră în Moldova: First Lego League, cea mai importantă competiție în domeniul roboticii	Allmoldova.md http://www.allmoldova.com/ro/news/romana-in-premiera-in-moldova-first-lego-league-cea-mai-importanta-competitie-in-domeniul-roboticii/	Mar 5, 2015
În premieră în Moldova: First Lego League, cea mai importantă competiție în domeniul roboticii	ITMoldova.com: http://itmoldova.com/it-news-md/premiera-moldova-first-lego-league-cea-mai-importanta-competitie-domeniul-roboticii/	Mar 5, 2015
FIRST LEGO League – pentru prima dată în Moldova	Ziarul de garda: http://www.zdg.md/stiri/stiri-divertisment/first-lego-league-pentru-prima-data-in-moldova	Mar 6, 2015
Premieră în Moldova: First Lego League Впервые в Молдове: First Lego League	Noi.md/Societate rubric http://www.noi.md/md/news_id/57336 http://www.noi.md/ru/news_id/57336	Mar 6, 2015
FIRST LEGO League Moldova First Lego League in Moldova	Allevents: http://allevents.in/chisinau/first-lego-league-moldova/1063865806960522	Mar 2015
FIRST LEGO LEAGUE MOLDOVA	Acasa Devreme, Jurnal TV: https://www.youtube.com/watch?v=dTmd2pz6_Co&list=UUWOfHbswzSRaWlx5nvsooig	Mar 4, 2015
FIRST LEGO LEAGUE LA BUNA DIMINEATA	Moldova 1 TV/ Buna Dimineata https://www.youtube.com/watch?v=ZksiHE2JgHI	Mar 7, 2015
Competiția în domeniul tehnologiei și roboticii - FIRST LEGO League	Privesc.eu: https://www.privesc.eu/Arhiva/60716/Competitia-in-domeniul-tehnologiei-si-roboticii---FIRST-LEGO-League	Mar 7, 2015
Întrecere cu roboți din piese Lego	Jurnal TV/Stirile curente rubric http://jurnaltv.md/ro/news/2015/3/7/intrecere-cu-roboti-din-piese-lego-10103504/	Mar 7, 2015
A inceput prima competitie de robotica din Moldova. Mai multi copii s-au intrecut la asamblat ...roboți: Castigatorii vor merge in Estonia	Pro TV/News/Social rubric http://protv.md/stiri/social/a-inceput-prima-competitie-de-robotica-din-moldova-mai-multi-copii---895361.html	Mar 7, 2015
StarNet-FIRST LEGO League Moldova	Jurnal TV: (Reportaj StarNet) http://www.jurnaltv.md/ro/news/2015/3/9/starnet-first-lego-league-moldova-10103964/	Mar 7, 2015
First Lego League a venit si in Moldova	Deschide.md: http://deschide.md/ro/news/social/11686/REPORTAJ-FOTO--First-Lego-League-a-venit-%C8%99i-%C3%AEn-Republica-Moldova.htm	Mar 7, 2015
RoboNanny, câștigătorul FIRST LEGO League, va reprezenta Moldova la competiția din Estonia	Diez.md http://diez.md/2015/03/08/foto-robonanny-castigatorul-first-lego-league-va-reprezenta-moldova-la-competitia-din-estonia/	Mar 8, 2015
FIRST LEGO LEAGUE in Moldova	Allfun: http://allfun.md/article/40870	Mar 9, 2015
Впервые в Молдове: First Lego League	Sanatate.md: http://sanatate.md/?l=ru&a=1&i=1356&m2=news&i2=13136	Mar 9, 2015
Roboti si distractie la FIRST LEGO League Moldova	Perfecte.md: http://perfecte.md/article/events/roboti-si-distractie-la-first-lego-league-moldova---896441.html	Mar 9, 2015

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