



USAID/COMPETE MONTHLY REPORT

February 1, 2016 – February 29, 2016



March 1, 2016

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government. It was prepared by DAI.

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DAI

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ACRONYMS AND ABBRIVIATIONS

BIM	Building Information Management
B2B	Business to Business
BRC	British Retail Consortium
CA	Israeli Civil Administration
COR	Contracting Officer's Representative
DAI	Development Alternatives, Inc.
EDF	Environmental Documentation Form
FY	Fiscal Year
GEW	Global Entrepreneurship Week
GLOBALGAP	Global Good Agricultural Practice
HACCP	Hazard Analysis Critical Control Point
HLITOA	Holy Land Incoming Tour Operators Association
ICT	Information and Communications Technology
IPM	Integrated Pest Management
LEED	Leadership in Energy and Environmental Design
LOA	Letter of Agreement
MoTA	Ministry of Tourism and Antiquities
PITA	Palestine Information Technology Association
PWA	Palestinian Water Authority
R&D	Research and Development
TWW	Treated Waste Water
SME's	Small and Medium Enterprises
SOW	Scope of Work
TAMIS	Technical and Administrative Management Information System
USAID	United States Agency for International Development
YPP	SAP Young Professional Programme

CHAPTER ONE: INTRODUCTION

The USAID/Compete Project is pleased to present its monthly report for the period of February 1 – February 29, 2016. The report includes February achievements and progress against interventions detailed in the Project’s Year Five Work Plan for both the West Bank and Gaza.

While the program in the West Bank is a continuation of the previous years’ activities in selected value chains and is mainly focused on concluding those respective development objectives, in Gaza Compete is opening a new chapter of programming after many years of limited development amongst a totally isolated economy. USAID/Compete aims to support the Palestinian private sector in strengthening its competitiveness and expansion into new local, regional, and international markets in the key sectors essential to the future prosperity of the Gazan economy. USAID/Compete will support the agribusiness, fishing, ICT, furniture, textile and garment, and domestic tourism sectors.

The West Bank program as planned is focused on building the production capacity of firms to grow locally and expand regionally and internationally. Our focus is on addressing key market failures that will open the horizon for new value chains.

In reviewing this information, the following report is organized into three sections and includes two appendices. Chapter Two, following this introduction, presents the key accomplishments and details of each technical sector, disaggregated by region. Chapter Three includes discussing activities’ progress for each sector during the past month as compared to the Compete Work Plan and their respective indicators. Finally, the appendices outline the lists of trainings and workshops already completed, as well as upcoming events of note, respectively.

CHAPTER TWO: KEY ACCOMPLISHMENTS

WEST BANK

AGRIBUSINESS

Agronomist Capacity Building Program

- This month USAID/Compete celebrated the graduation of Agronomists from the Agronomist Capacity Building Training Program which gave 28 Palestinians necessary skills, both in theory and practice, on agricultural practices to meet industry needs and find employment within the sector. As a result of the successful completion of the program, 18 trained agronomists have found employment to date and signed contracts with agribusiness companies. The program intended to solve one of the most critical impediments that a number of key agricultural sub-sectors face - finding qualified agronomists to manage the quality and productivity of local farms.



Sana Jalamneh, one of the agronomists graduating from the Capacity Building Training Program, receives her certificate. Sana found employment shortly after her training and now supports Marj Ibn Amer farms in the utilization of Treated Waste Water and planting new varieties of trees such as avocados and mangoes in the area.

ICT

SAP

Palestinian university graduates have earned valuable high-tech skills to support the Middle East's Digital Economy, thanks to a public-private partnership that graduated its first group of students today. As part of SAP's Young Professional Program, co-funded by USAID, 18 Palestinians are now certified as SAP Associate Consultants in SAP Business One. They completed a 2-month-long training program that included SAP software knowledge certification and a plethora of soft skill development workshops such as Design Thinking and Communication & Presentation Techniques.



The young talents, most of whom are women, take a "selfie" while celebrating their graduation and successful completion of the intensive SAP Young Professional Programme.

The aim of this unique program is to support in the creation of sustainable workplaces by boosting the business system knowledge of young graduates in the region. The training

program ties the most talented millennials in order to drive innovation and tackle unemployment in the region.

SAP's Young Professional Program in Ramallah was delivered and sponsored mainly by global technology company SAP in collaboration with the Office of the Quartet as well as the Palestine Ministry of Telecommunications and IT. It was co-funded by SAP Global Corporate Social Responsibility and by USAID's Compete Project that strengthens Palestine's economic competitiveness. Many Palestinian companies as well as representatives from the Ministry of Telecommunications and IT, attended the graduation and networking event and saw the strong commitment and attitude of the young talents.

STONE & MARBLE

Funoon Participate at the Tel Aviv Trade Show - Funoon participated in at the Tel Aviv Interior Design Trade show with USAID Compete Project support. The Tel-Aviv trade-show hosted professionals in the design, construction, and building industries.



A representative of Funoon explains the products on offer to visitors of the Tel Aviv Interior Design Trade Show. Firas says, "Trade shows like these are very important for us so people can find out who we are, what we offer and to find to contacts."

GAZA KEY HIGHLIGHT

Agriculture

In the vegetable and fresh herbs subsectors, the design for the scalability high-value production patterns program has been underway during February 2016 and the announcement of the program will follow. This initiative is expected to open up new opportunities for a great number of farmers in Gaza, 70 beneficiaries were identified in the vegetable sector and around 40 for fresh herbs.

The purpose of the fresh herbs program is twofold: to publish and disseminate the feasibility study conducted by Compete, and to scale-up the production of fresh herbs in Gaza. The feasibility study was developed using actual data from the existing demonstration fresh herbs farms, and will include the ability for each farmer/investor to tailor it to his/her actual business.

The purpose of the vegetable program is to introduce a new vegetables production pattern by replacing the plastic roof covers in greenhouses with netting to keep away insects during the summer period, which will increase yields and enhance quality. The program will target 200 dunums of vegetable greenhouses.

Tourism

The Tourism Sector Lead proceeded with application assessments of the firms who applied under FLAP. In addition, the Tourism Sector Lead conducted field visits to six companies to verify the information submitted as part of their company profiles as well as to discuss the needs and possibilities of supporting these companies. Preliminary market research was conducted to examine the availability of service providers in the local market.



Project staff explain to potential Gazan beneficiaries the processes required to become eligible for USAID/Compete assistance.

CHAPTER THREE: SUMMARY OF PROGRESS BY SECTOR

WEST BANK

Agribusiness Sector



Firm Level Technical Assistance – USAID/Compete has seen significant progress due to its new initiative to provide technical assistance to exporting and non-exporting firms in the agribusiness sector to increase financial, management, and marketing capacity. Firms which previously received USAID/Compete support are automatically eligible to receive assistance under this initiative; all others must apply. All firms undergo an assessment and, if selected, receive targeted support under three components: technical assistance, provision of equipment and inputs, and workforce development. Other sectors (ICT, Tourism, Stone and Marble) also follow this process.

Al Forat Company

In February, Al Forat hired an agronomist who graduated from the Agronomist Capacity Building Training Program. The agronomist is assisting in the implementation and adoption of quality systems. Following the GAP assessment conducted, the Project signed a purchase order for hiring a service provider to facilitate the adoption of a Quality Management System ISO 9001 and support Al Forats' capacity building efforts to meet future growth plans. The expected results of this intervention are sound HR, Administration, Finance, and Management systems. On completion of an internal audit Al Forat will request an external audit.

During the base period, Al Forat Company, located in Toubas, was assisted in establishing forward contracts with local and Jordanian companies to provide potatoes and carrots, resulting in a need for improved equipment to increase production. With the new cooling rooms and packing houses, high quality produce will be provided to their clients. Land use, since USAID/Competes' intervention, of Al Forat Company expanded drastically from 350 to 2,000 dunums.

Al Qasrawi Industrial & Trading Company Ltd.

During this reporting period, a GAP assessment began towards achieving ISO22000 certification. A final report is expected by the end of April 2016. Al Qasrawi Industrial & Trading Co. Ltd produces many varieties of crisps using high tech machinery. USAID/Compete will be assisting the company with development of a "Gap Assessment" for ISO 22000. Al Qasrawi will support an expansion in facilities to

add new product lines such as potato chips. Compete will work with a service provider to conduct a GAP assessment benchmarked against ISO22000 food safety standards.

Daraghmeh Company

Supporting the Expansion of Fresh Herb Farms. This reporting period one agronomist was hired by Daraghmeh Company from the Agronomist Capacity Building Training Program. Daraghmeh Company is currently involved in the production of fresh herbs on 120 dunums of green houses, in addition to 300 dunums of open fields planted with vegetables. The company is planning to expand their fresh herb production in 2016, enabling them to cultivate baby fresh herbs. The agronomist hired will help them achieve this goal.

Emirate Delights

Participation in Gulf Food Trade Show. USAID/Compete supported Emirate Delights in their participation in the Gulf Food Trade Show that took place during the reporting period. The outcome of this participation will be reported in March 2016.



Jamal Khalaf

Super-Hot Peppers. During this reporting period, a sophisticated high-tech grinder was delivered and installed with USAID/Compete support. The grinder is needed to build Jamal Khalaf's facility for super-hot pepper drying and packaging. In 2014, Mr. Khalaf planted five dunums of hot peppers as a trial under a forward contract with a client from the United States. The customer imported the production and was satisfied with the product quality to such an extent that expansion to other importers is promising.

"The machines are great, the new machine can produce more dried peppers and moreover, the quality of the final product is much better enabling me to compete in the global market. " Says Jamal Khalaf (above) while explaining the benefits of the new grinding machine procured by USAID/Compete (below).

USAID/Compete is supporting the farmer with the equipment needed to build a facility for drying and packing hot pepper for the export market. If successful, this initiative will be the first of its kind in the West Bank in which the farmer will be introducing a new high value crop with a high return in investment. Jamal Khalaf is aiming to increase production by planting 35 dunums in the Jordan Valley. It is expected that each dunum of land planted with peppers will yield 2 tons. The temperate weather will allow for an earlier harvest, and with the new machine, there will be the extra capacity needed to handle the volume of produce cultivated.



Jebrini

Participation in Gulf Food Trade Show. USAID/Compete supported Jebrini in their participation in the Gulf Food Trade Show that took place during the reporting period. The outcome of this participation will be reported in April 2016.

Kufr Dan Cooperative

Baby Cucumbers. Kufr Dan hired one agronomist from the Agronomist Capacity Building Training Program. The agronomist will follow up with producers of baby cucumbers to ensure quality, productivity and assist in adopting IPM (Integrated Pest Management). USAID/Compete is supporting the development of a new West Bank value chain through its firm level support to the Kufr Dan Cooperative for Agriculture and Irrigation. In addition to irrigation activities (well rehabilitation, installation of irrigation networks, etc.), Kufr Dan facilitates marketing of pickled cucumbers and baby cucumbers for its cooperative members. They have a total of 2,500 dunums, including 50 dunums of baby cucumbers planted under forward contracts, and plan to expand to 100 dunums by next season. However, in order to ensure quality standards are met for export, the cooperative has requested support to develop post-harvest facilities for sorting and storing. Next month (March 2016) a sorting line will be delivered, procured with support by the USAID/Compete Project.



The sorting line procured by USAID/Compete for TUPACK significantly raised the bar of quality, production capacity and profitability. Kufr Dan is expected to benefit similarly from such advanced equipment once operational.

Lemon and Lime

Computerized Irrigation for New High Value Crops.

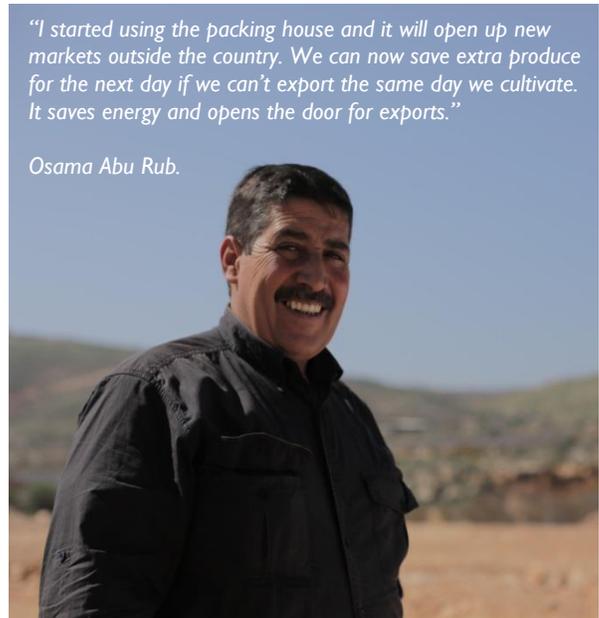
During this reporting period, a contractor commenced installation of the reservoir for Lemon and Lime and is expected to be completed next month (March 2016). By March our vendor will install the computerized irrigation system. A grant was awarded to the Lemon and Lime Agricultural Company during October 1 – December 31, 2015. Established in 2014 in the village of Bardalla in the Jordan Valley, the company is working to expand their fruit farms to include mangos, avocados, pineapples, seedless grapes, guavas, and other cost-effective crops that are geographically suitable. USAID/Compete will be supporting the company's plans for expansion by helping them overcome one of their main challenges - the availability of water resources. The support will include the provision of a computerized irrigation system which will result in water savings of up to 60 percent and an increase in the productivity of their fruit trees by up to 20 percent. Forty dunums are expected to come under new technology and at least 10 new employees will be hired as a result of USG assistance.

Mushroom House

Mushroom House is a newly established company owned by three women and one man. They plan first to produce mushroom mycelium and then mushrooms. Currently mushroom farmers in the West Bank face difficulties due a lack of the seed mycelium, which must be imported from Holland where delays in shipment negatively affect production. USAID/Compete is filling the gap in the value chain by specifically targeting the missing joints in the chain, a lab, sterilization unit for compost and mycelium production. The lab will not only provide mycelium for Mushroom House, but will also supply other local mushroom growers. This month, installation of the floor base and the hanger began in preparation for the expected delivery in March-April 2016 of lab equipment, sterilization units and mycelium incubator equipment. As a result of USAID assistance to this project, four full-time staff members are expected to find employment.

Osama Abu Rub

Cooling Rooms for Strawberries. This reporting month Osama Abu Rub began using the packing house procured by the Project. In order to help Osama Abu Rub maintain the necessary cold chain and ensure a high quality product, USAID/Compete supported Abu Rub with the installation a packing house and cooling room. This is the first packing house for strawberries in the West Bank and Gaza. Osama Abu Rub, a farmer involved in the production of open field and greenhouse vegetables, is a previous recipient of USAID/Compete support under the Strawberry Scalability Program.



"I started using the packing house and it will open up new markets outside the country. We can now save extra produce for the next day if we can't export the same day we cultivate. It saves energy and opens the door for exports."

Osama Abu Rub.

Qitaf Company- Jiftlek

Qitaf activities include the cultivation of dates. Current Qitaf clients are Palestinians, Israeli, French, and Turkish. Qitaf plans to expand their farming projects and produce more varieties, and reach the UK, South African, and Far East markets. Future plans of procuring, packing, and marketing seedless grapes will require Qitaf to become GLOBALGAP and BRC certified. Based on GLOBALGAP assessment results, Qitaf began working on adapting their systems in order to be aligned with international standards. Last month, a trained agronomist from the Agronomist Capacity Building Program was hired and during this reporting month is following up with implementing the quality system and with date farm needs. To date 18 agronomists from the Agronomist Capacity Building Training Program have found employment.

Sami Abu Mansour

Supporting the Expansion of Fresh Herb Farms. Sami Abu Mansour is currently involved in the production of open field and greenhouse vegetables. Sami's farm has produced fresh herbs, but export capabilities are hindered due to a lack of skilled workers and low prices offered by local middlemen. To be able to expand the farms' abilities in exporting, Sami is aiming to achieve GLOBALGAP certification. To date, the Project supported Sami's farm through irrigation systems and providing soilless cultures. Sami Abu

Mansour's farm started adapting the system based on the benchmark set by GLOBALGAP and last month hired a trained agronomist from the Agronomist Capacity Building Program to follow up on the implementation of the GLOBALGAP system and the fresh herbs farms, thus improving the quality of produce and prices.

Supporting Facility and Service Upgrades – USAID/Compete is strengthening targeted export ready and non-export ready subsectors by assisting with resource upgrades on a cost-share basis that would otherwise limit the sector's ability to grow.

Al Hithnawi

Al Hithnawi General Trade Company, a seed and spice packing company, upgraded their production facilities with USAID/Compete support to stimulate the local market by providing new products: herb and seed oils. As a result, over 100 local suppliers are benefiting from Al Hithnawi's need for large quantities of local produce for raw materials. The agronomist who was hired is following up with farmers providing input and fresh herbs for oil production, in addition to supporting the adoption of ISO22000 food safety standards.

Vegetable Nurseries

During FY2014, USAID/Compete supported two nurseries, Atta Abu Rub and Juneidi, in upgrading nursery facilities, including seeder machinery, shading nets, and a washing machine, according to GLOBALGAP standards. These upgrades enabled one nursery to donate an old seedling machine to Thinabah Nursery, further strengthening the sector. USAID/Compete provided machine training to the staff at Thinabah to ensure sustainability. The agronomist hired by Atta Abu Rub is currently following up with quality standards.

Strengthening High Value-Added Products, Services, & Technologies

Launching Pilot Projects – USAID/Compete is assisting high value-added subsectors in launching pilot programs with new technology and/or new crops to increase productivity and meet market demands. Past subsectors targeted include strawberries. The Project will assess the feasibility of other subsectors. For update regarding baby herb pilot production, see update above under FLAP – Daraghmeah.

Strawberry Subsector

USAID/Compete is assisting the strawberry subsector in increasing productivity, improving strawberry quality, and meeting export standards. During early 2014, strawberry farmers worked on a cost share basis to upgrade their infrastructure and received training to support the upgrades, enabling increased production rates, improved quality, and an earlier harvest season this quarter.

Strawberry Scalability Program - USAID/Compete is working to scale-up strawberry production in the West Bank by replicating the demonstration farm models developed in early 2015 by the Project to introduce new technologies using hanging and computerized irrigation systems. The outcome of these demonstrations was favorable in terms of productivity and profitability; therefore, USAID/Compete is sharing its findings publicly and presenting a business opportunity for West Bank farmers and investors.

This month two (2) farmers signed Letters of Agreement with USAID/Compete joining the Projects' Strawberry Scalability Program, which along with the five farmers joining last month, brings the total land for production of high quality strawberries to 21 dunums. The farmers will ready their farms for the Spring/Summer season.

Agronomist Capacity Building Training Program – Agronomist Capacity Building Program

- This month USAID/Compete celebrated the graduation of Agronomists from the Agronomist Capacity Building Training Program which gave 28 Palestinians necessary skills, both in theory and practice, on agricultural practices to meet industry needs and find employment within the sector. As a result of the successful completion of the Agronomist Capacity Building Training Program, 5 trained agronomists signed contracts with agribusiness companies, while 13 are finalizing their contracts. The Agronomist Capacity Building program intends to solve one of the most critical impediments that a number of key agricultural sub-sectors face - finding qualified agronomists to manage the quality and productivity of local farms.

In order to strengthen the competitiveness and export potential of key agricultural subsectors in the Palestinian economy, USAID/Compete is providing assistance to upgrade the technical experience and performance of agronomist graduates to facilitate their recruitment into enterprises working in fresh herbs, dates, carrots, potatoes, dried herbs, and olives. The Project identified the urgent need for qualified agronomists to work in the above targeted subsectors based on the daily communication of the Agricultural Technical Team with the Project's beneficiaries. Topics covered, theoretical and practical, covered included olive and olive oil production, farm management and export, strawberry farming, financial management, fresh herb farming, date farming, date field training, Hazard Analysis Critical Control Point (HACCP) training, and post-harvest techniques. In addition, the trainees were introduced to the best practices of the GLOBALGAP certification system. Lastly, the trainee's field technical sessions focused on strawberry, dates and fresh herbs farm management.



The young group of Agronomists pose proudly with their certificates after their graduation ceremony.

Tapping Unused Water Resources – USAID/Compete is beginning to work sector-wide with stakeholders, local authorities, and key actors to help them access and maximize the use of current water resources. This will increase irrigation to improve both the quality and quantity of agricultural products, transforming the Palestinian agribusiness sector into a globally competitive industry. The project will identify underutilized wells and transfer excess water to nearby areas including Area C.

Tammoun Project

The Tammoun Project aims to transfer water from wells located in Ras Elfaraa and Al Nasarieh to the Al Baqea'ah plain to irrigate 4,500 dunums. Following the favorable results of the assessment report conducted in earlier stages, the Compete Project is currently supporting the delivery of preliminary designs aiming to obtain and secure necessary approvals the CA.

Introducing New Water Sources / Enhancing Access to Quality Water – USAID is pursuing treated waste water (TWW), a previously untapped resource in the West Bank, as a solution to the largest impediment for agricultural production, water shortages. Reuse of TWW is one of the few feasible means of increasing water resources and offers significant opportunity to introduce new crops for export. USAID/Compete has been working closely with the Ministry of Agriculture (MoA) to address the challenge of access to quality water for agricultural irrigation, particularly in Area C. Compete is currently designing two projects in Area C, namely reuse of TWW in Deir Sharaf to irrigate 7000 dunums of farmland.

Deir Sharaf TWW

USAID/Compete is supporting the design and expansion of the Deir Sharaf TWW plant in Nablus to provide an alternative water source for farmers in the area

Following the submission of preliminary designs of Deir Sharaf project to the Israeli Civil administration (CA), this month a site visit was requested by Mekorot Company- the Israel's Water Authority , in order to consider the locality of their water pipes in the final detailed designs. Accordingly, Compete submitted the alignment of the water lines to Mekorot Company pending their approval.

Deir Sharaf demonstration / pilot project

Twenty four (24) farmers from Deir Sharaf were identified in February to participate in the pilot project utilizing their combined 125 dunums of land. USAID/Compete is currently working on establishing a 125 dunum demonstration site to introduce and adapt the practices of wastewater reuse for irrigated agriculture in Deir Sharaf. Last month, several meetings were held with Nablus Municipality and Deir Sharaf water users association in order to agree on initial designs and considerations, in addition to the beneficiary list (farmers) who will irrigate their agricultural products with the reclaimed water. An RFP will be prepared and released for vendors to compete on implementation works next Month (March 2016).

ICT Sector

Enhancing Market Access Firm Level Technical Assistance Program

Iris Interactive Solutions

In December 2015, an LOA was signed with Iris Interactive Solutions, a Ramallah based company that provides interactive touch screen solutions to several segments in the local market. They have recently launched a new solution called “sensory room” that aims at assisting children with autism. USAID/Compete will support the company in testing its autism therapy sensory room solution in ten local and regional locations. This will allow Iris to validate the product and the whole business idea and eventually expand in the targeted markets which include Jordan, Saudi Arabia, and UAE markets.



During this reporting period Iris Solutions won the regional competition in Dubai and in June 2016 will be heading to Washington DC for the final “1776” Challenge Cup. Iris will be running for the global competition along with 45 regional winner start-ups competing for USD \$ 1 million worth of prizes, and one title.

While in Dubai for the competition, Iris Solutions also conducted meetings with potential investors and kicked off a crowd funding campaign to raise capital using the Venture Fin platform.

Closer to home, Iris signed a cooperation agreement with the Palestinian Ministry of Education to support, enhance and develop the education sector in Palestine. Iris will be providing the sensory environment



Ayman Arandi, CEO of Iris Solutions presents the “Sensory Room” to the 1776 competition participants in Dubai.

solution “Sensory Box” across schools and kindergartens in the West Bank. USAID’s support is assisting ever more Palestinian ICT businesses in developing and launching new products and services and reaching local and international markets. Towards this goal last month Iris Interactive Solutions installed two sensory rooms at the An-Najah National University Hospital as well as at the Red Crescent Society. This reporting period they also sold and additional three (3) sensory rooms in Hebron, Al Khader and Dura. Lastly, Iris Solutions also signed an LOA to conduct market research in Jordan as part of their export market development drive to find new clients in the Kingdom.

Social Dice

Social Dice raised USD \$300,000 from different local and regional investors, and have now started preparing for a Series A USD \$1.5 million investment, which will see Social Dice jump from seed money to venture capital. They are seeing revenues increasing rapidly from UAE and Jordanian Markets. With larger investments Social Dice will require improvements in their management and legal frameworks and systems in order to become eligible for larger investments. Social Dice are currently in talks with Microsoft Gulf to bundle their solution as part of the Office 365 software.

SAP Software Technology Training – Palestinian university graduates have earned valuable high-tech skills to support the Middle East’s Digital Economy, thanks to a public-private partnership that graduated its first group of students on the 16th of February, 2016. As part of SAP’s Young Professional Program, co-funded by USAID, 18 Palestinians are now certified as SAP Associate Consultants in SAP Business One. They completed a 2-month-long training program that included SAP

KEY USAID/COMPETE ACHIEVEMENTS IN TECH ENTREPRENEURSHIP & YOUTH DEVELOPMENT

- **53:** Number of ICT startups developed products or signed contracts
 - **31:** Number of ICT startups established
 - **\$388,000:** Total amount of startup capital raised by youth
 - **118:** Jobs created
- All figures by end of 2015.



software knowledge certification and a plethora of soft skill development workshops such as Design Thinking and Communication & Presentation Techniques.

The graduates during the ceremony with representatives from USAID, SAP, the Ministry of IT, Office of the Quarter and the USAID/Compete Project.

SAP Software Technology, headquartered in Germany with regional offices in 130 countries, is a multinational software corporation that makes enterprise software to manage business operations and customer relations. The company is hurting from a shortage of certified engineers who can provide services for their global and regional customers, opening a window of opportunity for Palestinian software firms to fill the gap. This new initiative involves qualifying software companies to provide SAP

solutions, training fresh graduates on SAP technologies, and facilitating international projects for Palestinian companies.

USAID/Compete supported SAP in implementing its YPP - an intensive training “boot camp” designed to equip suitable candidates with the skills necessary to gain employment as a junior SAP consultant. Qualifying candidates who completed the YPP will be employed on SAP projects in key markets including Saudi Arabia, the UAE, and elsewhere in the Gulf mainly through locally identified Palestinian SAP partners. The aim of this unique program is to support in the creation of sustainable workplaces by boosting the business system knowledge of young graduates in the region. The training program ties the most talented millennials in order to drive innovation and tackle unemployment in the region.

Export Market Assessment – USAID is supporting ICT companies to scale-up their current export activities by assessing ten companies and providing them with export market development plans. The assessment, completed in April 2015, identifies current gaps in export companies which hinder export development and create an export management structure to ease the export process for ICT companies.

At the beginning of April 2015, a Compete consultant interviewed companies to gather data for the assessment. Following this assessment, the Project conducted a study to identify product and market niches among the ten companies. The assessment will assist these companies in becoming more competitive in the international markets, enabling them to grow. Following this activity, selected companies will be supported under a cost-share scheme to hire market research companies to assist with expansion plans. The Niche Market Determination was underway as of the close of the year.

This month the Project signed LOA’s with three companies, Al Andalus, H+W and Progineer, to conduct market research in different countries.

Support to Start-Ups and Accelerators –

LEADERS – eZone - Deputy Consul General visits Leaders E-Zone, Palestine’s first technology hub established with support from USAID.

H.E. Ambassador Daniel Sepulveda the Deputy Assistant Secretary of U.S. Department of State visited the first Palestinian technology hub E-Zone, which was established by Leaders Organization with support from USAID. The hub is acting as a center for Palestine’s growing technology entrepreneurship community addressing some of the key constraints and challenges faced by community members.



H.E. Ambassador Daniel Sepulveda views the work of young techies based at the first Palestinian technology hub, E-Zone, established with USAID assistance.

Since E-Zone was established it has made remarkable progress towards revitalizing the entrepreneurship ecosystem, becoming a center for Palestinian entrepreneurs. On any given day the café at the hub hosts programmers, investors and entrepreneurs discussing innovative ideas and the next deal. In less than a year, E-Zone has assisted 32 entrepreneurs to start and grow 16 technology companies – in turn creating 111 job opportunities for programmers, designers and business professionals. By providing incubation space for technology enterprises and a multipurpose hall and a café, LEADERS' technology park facilitates formal and informal community gatherings, trainings, and events.

Some of these Palestinian startups, including FadFid, PinchPoint and RedCrow, showcased their startup businesses to H.E. Ambassador Sepulveda. These startups form part of the rapid expansion and growth of the Palestinian ICT sector over the last few years, which now claim more than 250 small sized companies, which together employ 6000 professionals.

During the base period, USAID/Compete supported the development of a new accelerator, eZone, by providing mentorship, consultancies, and short term employment for startups. USAID's support of eZone has enabled an environment attracting foreign companies to open offices in West Bank. Recently, USAID/Compete has awarded a grant to LEADERS to support them in adding a program manager for a defined period of time who will build their business development capacity that in turn will support revenue generation, and assist with the operational costs of the technology park. The grant will also support Leaders in becoming operationally sustainable by 2017.

Palestinian Internship Program (PIP) – The Palestinian Internship Program (PIP) unofficially launched in October 2013 and officially incorporated as a 501(c)3 registered non-profit organization in Delaware in January 2014. The program was founded by Yadin Kaufmann, an experienced investor in Israeli start-ups and the co-founder of Sadara Ventures, the first venture capital fund investing in Palestinian high-tech. By October 2015, the program had completed two pilot rounds supported by USAID/Compete. PIP endeavors to address market failures related to Palestinian workforce development and high-tech employment by providing high-level internships for young graduates at start-up and multinational companies based in Israel. The idea that underscores the program is that by providing these internships to young Palestinian professionals, PIP can provide a framework that helps keep Palestinian techies in the field and gain crucial professional skills by exposing them to a highly developed high-tech economy. In other words, PIP seeks to help young professionals “leapfrog” the current state of the Palestinian high-tech economy and to instill in them the know-how they will need to grow Palestinian companies.

Following the success of their six month pilot, PIP is developing recruitment, alumni, and monitoring and evaluation systems in order to manage relationships, measure results, and ensure program effectiveness. The success of the program is dependent on solid relationships within both the Palestinian and Israeli hi-tech and startup communities, effective marketing of the value proposition for Israeli companies to take on an intern, and data-driven identification of key skills required to succeed in the hi-tech ecosystem matched with willing hosts. Compete is supporting the Palestinian Internship Program with a Fixed Award Amount (FAA) Grant, enabling them to conduct the third and fourth cycles of their internship program.

Compete provided vital support to both the initial Palestinian Internship Program pilot (two cycles of internships), as well as their current, improved program (cycles 3 and 4). Compete's financial support was bolstered by direct business consultation in analysis of the program's lessons learned, effectiveness and performance. The program competitively selects youth from across Palestine to match with hi-tech firms, startups and other internship placements in both Israel and Palestine, supported by a series of professional training workshops. To date (cycle 3), 15 youth have taken part in this program.

This reporting period, the 10 interns in Cycle 3 are placed at the following companies:

- Beyond Family Office (Tel Aviv)
- Thomson Reuters (Petach Tikva)
- HP Indigo (Nes Tsiona)
- Startup Nation Central (Tel Aviv)
- Google (Haifa)
- Freightos (Ramallah)
- Yamsafer (Ramallah)
- XLN - Cross Labs Networks (Tel Aviv)
- Energiya Global (Jerusalem)

In the next month, March 2016, preparation is underway for a workshop at Energiya Global in Jerusalem on the subject of venture capital investment led by Takwin CEO Itzik Frid; a workshop on developing entrepreneurial at Lool Ventures in Tel Aviv; and PIP's major Cycle 3 gathering.

For the Cycle 3 gathering taking place on Thursday 17 March, PIP's current interns, alumni, representatives from host companies and USAID, and other PIP supporters from the Palestinian and Israeli high-tech and business communities will gather in Petach Tikva to celebrate PIP's third round of internships. Fittingly, the event will take place at a PIP host company – the R&D center of media multinational Thomson Reuters, located at the Petach Tikva Tech Park.

The event will be a unique opportunity to hear the latest chapter of PIP's story from interns, PIP founder Yadin Kaufmann, and guest speaker Fared Qaddoura, CTO of PIP host company Freightos. The next cycle of internships will also be previewed at the event.

Stone And Marble Sector



Enhancing Market Access Firm Level Assistance Program

Abu Kamil Automatic Block Factory

The pilot production line for lightweight concrete blocks was installed last month, and the initial samples (3-4 different compositions) were sent to Al-Najah University for testing and results are expected in March. USAID/Compete is addressing the issue of stone waste by supporting the gradual transformation of the industry toward the use of business solutions for “dry sludge” and “liquid sludge,” thereby creating commercially viable and environmentally conscious new products out of previously un-utilized stone production waste.

Creating these competitive new products will lead to business opportunities that could be targeted in local markets; with this vision in mind, USAID/Compete is working with Abu Kamil Automatic Block Factory as a pilot program to produce lightweight foam based concrete blocks using liquid slurry produced during the stone cutting process. Pending investment in a complete production line, USAID/Compete assistance will have remarkable impact on the factory as well as other small and medium stone producers in Nablus Governorate since Abu Kamil will be able to utilize their stone waste and turn them back into raw materials.

Al Aqsa for Marble

An LOA was finalized with Al Aqsa for Marble Company in late 2015. USAID/Compete will support the company in revamping their marketing; developing a new promotional image, logo, and catalogue design; and conducting a study on the South Korean market. A sample catalogue has already been designed and Compete has provided feedback for finalization. The service provider is working on feedback and USAID/Compete’s communications team if following up.

In addition, Compete approved supporting Al Aqsa Company for Marble and Stone in purchasing an on-line international market study for South Korea. This support comes as the company is seeking to expand into the international market, focusing on one new market, South Korea. This study will provide Al-Aqsa company with a comprehensive review of the South Korean market enabling them to make sound business decisions. The study was completed and sent to Al Aqsa for their review. Compete will continue to provide technical assistance through Firm Level program to companies such as Al-Aqsa who present willingness to grow.

Al Anan

Support to participate in the Middle East Trade Show 2016 will be provided by the Project. To date, booth space has been reserved by the Project. Participation of Al Anan with Project support has been secured with payment made for booth space for the March 2016 Xiamen Trade Show in China and the April 2016 Coverings Trade Show in the US.

Al-Haramein Company

Al-Haramein is a stone producer located in Hebron's Industrial Zone specializing in stone slabs and building stone. Currently they sell to Israeli and Jordanian markets and are looking to expand into the Gulf market. One of their main challenges is the high cost of electricity. The Project will assist them in a renewable energy assessment.

Al Omraniyeh Group Company

Previous support to Al Omraniyeh included supporting their participation at tradeshow. More recently, a meeting with Al-Omraniyeh Company took place on February 1st at their office in Bethlehem to understand some of their requests and identify possible key interventions that could support their development.

We are awaiting a price offer from Al-Omraniyeh for the comprehensive development of a "product data sheet and installation instructions". This product is a first for the stone sector and will support their needs and position them to standardize their product portfolio and market themselves internationally.

Due to delays with vetting, the company is unlikely to participate at the Coverings trade show in April without USAID/Compete support. Pending vetting results, the Project will conduct a meeting with Al-Omraniyeh to decide on the final proposed interventions then prepare their case to be presented to the committee panel.

Fonoun Arts of Carved Stone

Fonoon participated in at the Tel Aviv Interior Design Trade show with USAID Compete Project support. The Tel-Aviv trade-show hosted professionals in the design, construction, and building industries.

Fonoun Arts' is the first Palestinian company to invest heavily in high tech equipment for the creation of new high-end value products, such as stone products carved using computerized machinery. Winning an award at the recent Middle East Trade Show is a testament to the standards of quality Fonouns Arts's aims to achieve. USAID/Compete will continue to support them in reaching clients regionally and globally. In the coming quarter, work will be underway to conduct market studies of the US, Canada and UAE specifically. The studies will provide contacts and information for major players and recommended actions. The impact of supporting Fonoun Arts' is creating a positive image of Palestinian stone in export markets, increasing profits, and benefiting other players in the value chain of the stone sector.



A representative of Funoon discusses with a potential client at the trade show tailored creative Funoon products on offer.

Mohammad Arafat and Partners for Stone and Marble

USAID/Compete will be supporting the company in conducting product specifications tests. A meeting took place between Project staff and Mohammad Arafat at their new show room, under construction, located in Beit Iba. A final activity report was signed and a tour of the premises conducted. Mohammad Arafat will seek additional Project support through FLAP for their showroom.

Sharabati Modern Company

Sharabati Company produces slabs, outdoor tiles, indoor tiles, and cut-to-size building stone. USAID/Compete will provide technical assistance through supporting a new Materials Management, Image, and Bar Coding System for the company and will conduct a full electrical audit to enable the company to determine the best way to reduce electricity costs. The Project will also support their participation in the Coverings tradeshow in the US that should yield high value results, including the establishment of new contracts. This month an Environmental Documentation Form (EDF) was approved for the barcode system. Procurement was initiated for the manual and visual optimizer detecting system, however to date only one bidder applied. The Project has also paid for Sharabati's participation at the coverings trade show, to take place in April 2016.

Techno Fonoun

The Project's firm level review panel approved Techno Fonoun's application for support, last reporting period, wherein USAID/Compete will provide technical assistance for the installation of a high-tech laser printing machine, as well as a water recycling system for capturing the water released during the production of carved stone in order to contain, filter, and utilize it for production reuse. In addition,

Techno Fonoun will abide by environmentally friendly practices. Techno Fonoun is working towards the introduction of new products and sub-sectors by introducing laser printing and etching on stone, glass and marble, a first for Palestinians. The innovation will impact the sector by increasing employment and the introducing tourism based products. This month an action memo and EDF was approved. Next month Compete will sign a grant with them and a site will be prepared to house the production area.

Yaboos Company

Yaboos is specializing in a wide variety of operations in the field of stone and is considered a specialty producer of decorative and antique tiles for indoor designed based applications and outdoor decorative areas. The main challenge facing stone companies is their ability to access new markets; especially as the majority of producers rely on Israeli companies to market their products on their behalf in the global market. USAID/Compete, through the Firm Level Assistance Program, started working with Yaboos Company to develop their promotional materials to attract customers and be better positioned in new markets. Activities with Yaboos are underway with the aim of enhancing its marketing channels and building the company's identity by developing a new theme for its brand that will be reflected across its publications and promotional tools.

Towards this aim meetings took place between Project staff and a vendor "Site Trip" to complete preparation of the website and design of new brochures. Once the website and brochure designs are completed, Yaboos Company will be able to reach out to previous leads and potential new customers with a unified new image and modern designed marketing materials. The activity is expected to be completed no later than the end of March, pending any comments to launch the website at that time and wrap up the brochure design.

Tourism Sector

Enhancing Market Access

Firm Level Assistance Program

During the month of February three applications through FLAP were received, one in the West Bank and two in Gaza.

City Inn Hotel

A Letter of Agreement was signed in late 2015 with City Inn Hotel to support them installing a comprehensive property management software system. The system, successfully installed, is expected to enhance the hotel's business operations, which will help reduce operational costs, increase its operational capacity, increase the number of clients, expand to new markets, and generate revenues. In January the training on the system was completed. Follow up with the vendor took place during February to obtain VAT exception. A payment will be made during March by the Compete Project to the vendor Inspire Company that completed the installation of the system.

Grand Hotel

Work on developing a business development plan for Grand Hotel was completed this month. A Purchase Order (PO) was signed with Grand Hotel (as well as Orient Company) which specified requirements to milestones set by the Project. All assessments and reviews concerning documentation, site, market, executives and operations were all completed. Orient company is now working on developing the hotel organizational chart, job descriptions, and all financial and operational planning templates. It's expected that by end of April all works will be completed and approved by the beneficiary.

Laila Tours and Travel

Laila Tours have been providing quality tours and pilgrimages to the Holy Land, Jordan, and Egypt since 2006, and also provide outbound ticketing services for residents and visitors to the Holy Land. USAID/Compete will be supporting Laila Tours by deploying new systems to manage and improve their financial capacities and sales plans. The Project is assisting the company translate the content of their website from English and Arabic into Spanish and French to help enhance their outreach to the French and Spanish markets, two of their major client bases. In January selection of translation service providers was completed and New Vision Company was awarded. It is expected in the next two months the translation of content to French and Spanish will be completed. Project also followed up with Laila Tours to provide documentation of their participation at tradeshows.

Orient Palace Hotel

USAID/Compete will be providing Orient Palace Hotel with comprehensive hotel management software. This system is expected to enhance business operations among these hotels, which will help reduce operational costs, increase their operational capacity, grow the number of clients, expand to new markets, and generate higher revenue. The system will also enable beneficiaries to update and maintain their records, enhancing their managerial and decision-making capabilities. Finally, the software solution will help them to organize their procurement and compliance procedures, eventually enhancing their performance in all aspects. In quarter one of fiscal year five, the LOA for the Orient Palace Hotel was signed and procurement completed, with implementation kicked off in December 2015. This month the Hospitality Management software was installed and training completed and the system has become operational.

Sancta Maria Hotel

Sancta Maria Hotel is located in Bethlehem and is being supported by the Project to enhance its organizational, management and marketing capacities. Last month, USAID/Compete signed a Letter of Agreement for Sancta Maria to provide and install hospitality management software, in addition to provide the design and produce marketing and promotional material, by generating the required engineering reports that will help the hotel comply with Civil Defense requirements in order to be classified. Next month a PO will be signed to begin work with an identified vendor for the hospitality management software. In this reporting period a PO was signed with a local company to develop Sancta Maria's website. Within two weeks of installation training will be completed.

Traveller Experience Tours (TE- Tours)

TE-Tours is a start-up tour operator based in Jerusalem, and a member of the Holy Land Incoming Tour Operator Association (HLITOA), Arab-Brazilian Chamber of Commerce, Skal International, and the Institute of Travel and Tourism-UK. TE-Tours works on inbound tourism, and seeks to diversify the offerings to tourists visiting the Holy Land. It is distinguished by its flexible programs built around various types of requests and visits, with its main established markets being Portugal and South America. Moving forward, TE-Tours' plan for 2016 focuses on expanding their services further in two markets: Spain and Brazil.

During the month of February a follow up meeting took place with TE concerning their activity close out report, which the Project received and approved. The Project also followed up on documentation of TE's participation at the FITUR trade show in January 2016.

Developing a Tourist Information System – USAID/Compete supports the growth of commercially viable, privately run, comprehensive visitor information systems in the West Bank. Palestinian information systems are a critical component to attracting adventure tourists and cultural travelers and were previously primarily dependent on public or donor funding to operate. As a result, service is frequently interrupted due to funding cuts and information is rapidly outdated given the meager operational budgets.

VisitPalestine

VisitPalestine, an online destination travel guide, was selected to be developed as a commercially viable resource to guide foreign and local visitors in Bethlehem and the Holy Land. VisitPalestine is expanding their resources for tourists by establishing a tourist information office (TIO) in the heart of Bethlehem with staff speaking nine languages, redeveloping their website (www.VisitPalestine.ps in English, Arabic, Spanish, and Italian), and developing a mobile application to help visitors with special features such as planning, booking, maps, and city guides. The company was supported under a grant that ran until August 2015.

During the month of February all works under the Visit Palestine Grant were completed. Below are the main results and statistics regarding the project:

- Visitors Inquiries: over 1,500 inquiries served (online and via the Bethlehem Information Center)
- Tours: Over 20 tours completed with over 150 participants
- Newsletter: Over 7,000 opt in email subscribers
- Events: Over 10 events (exhibitions, movie screening, food tasting etc.) with over 350 participants
- Advertisers: Over 30 hotels, tour operators now advertising on the site
- Tour Guide: Over 60 tour guides are listed on the site
- Website traffic: around 80% visiting the new website are new visitors.
- Social media:

- Facebook fans increased from 21K to over 55K
- Trip advisor: 20 reviews (Ranked #1 travel Resource in Bethlehem)
- Booking.com: 10 bookings with over 20 bed nights
- Gift Shop Suppliers: Products from over 80 arts and crafts suppliers from across Palestine are currently showcased in the Gift Shop (Sales revenue of nearly USD \$40000 in 2015)

Strengthening High Value-Added Products, Services, & Technologies

Rehabilitating Urban Sites and Upgrading Tourism Infrastructure - Working to build the full “destination eco-system” for key tourism sites in the West Bank, USAID/Compete has improved several tourism sites and trails including urban rehabilitation works in important historical locations in Bethlehem, Burqin, Bethany, Battir, Beit Sahour, and Jericho.

Last month a final decision was made after consultation with USAID for the final list of renovation sites to be supported by the Compete Project, namely; Hebron, Battir, Beit Sahour, and Burqin. To date USAID/Compete has conducted an evaluation of potential contractors to carry out renovation works, through a review of their expressions of interest. The Project representatives met with the Ministry of Tourism and Antiquities to confirm the list of sites to be renovated. In addition an RFP for solicitations was issued this month. Part of his submission included a detailed Scope of Work was also developed for the engineering firm (for design and renovation) to follow including main tasks to be accomplished and deliverables to be submitted per each activity. The RFP also included the scoring and evaluation criteria for site renovation bids. Lastly, a meeting took place between Project staff and the Minister of Tourism and Antiquities (MoTA) in Bethlehem to confirm the 4 selected sites before RFP releasing.

Fostering Strategies to Improve Human Resources and Services

Supporting a Hospitality School – In conjunction with the curriculum developed for Bethlehem University, USAID/Compete developed plans for a Hospitality School modeled after the Amon Hotel School in Amman, Jordan. Plans for the school incorporate key findings from previous assessments, including geographic demand. The school will increase industry standards and the attractiveness of careers in the hospitality sector to Palestinians. In this reporting period, a grant was signed with Bethlehem University to start the development of an architectural design overview of the hospitality training school at Bethlehem University’s Mount David site. In January, initial structural assessments were conducted and final results of the assessment will be ready by March 2016. Once these are available concept design for the hospitality school can proceed.

GAZA

Firm Level Technical Assistance – USAID/Compete has begun the roll out of its initiative to provide technical assistance to exporting and non-exporting firms in Gaza to increase financial, management, and marketing capacity. All firms undergo an assessment and, if selected, receive targeted support under three components: technical assistance, provision of equipment and inputs, and workforce development.

The Firm Level Technical Assistance Program in Gaza was officially launched on Sep 8th 2015. USAID/Compete continued to receive and assess new applications under FLAP. To date 536 applications were received since the beginning of the Gaza program [September]. The pipeline is distributed as follows:

	Total Applications	Approved/Assessed Cases	Rejected Cases	Resubmission Cases	Excluded Cases	Vetted Cases
Agriculture	325	58	21	0	0	105
Fish	11	4	0	0	1	6
Furniture	71	20	0	0	1	23
ICT	51	6	3	0	0	11
Tourism	30	0	0	0	0	2
Textile	48	20	0	0	0	20
Totals	536	108	24	0	2	167

For a comprehensive list of ongoing Gaza activities please view the table further on in this section.

Visits and Meetings

- This February, the COP of the USAID/Compete Project visited Gaza to meet with representatives of the furniture, garment and textile sectors and potential clients, to understand their needs, challenges, and keep them engaged. The COP also visited the Gaza office for oversight of staff there and to ensure ongoing activities are moving forward.
- Compliance and administrative staff from the West Bank office met with their colleagues in the Gaza office to support and train them in USAID compliance and procurement rules and regulations, as well as supporting sound M&E practices to strengthen capabilities of the Gazan USAID/Compete office staff. The Gazan staff also received training on TAMIS, navigating the Project server and how to use and feed into current systems in place for documentation.
- The West Bank tourism sector lead visited Gaza and met with representatives of the industry as well as companies which submitted through FLAP and followed up with their company profile submissions. The sector lead also assessed limitations for the sector as well as opportunities.

- Agriculture sector staff met with potential beneficiaries in Gaza. The purpose was to conduct company assessments and verify information sent by companies applying through FLAP. In addition the staff member updated information regarding the fresh herb scale up program and met with representatives of vegetable cooperatives and marketing companies to update information for the vegetable program.
- Lastly, the ICT sector lead visited Gaza to conduct company assessments and ensure information sent by companies applying through FLAP is valid.

Agribusiness Sector

Cross Cutting

As part of USAID/Compete's plan to address water challenges affecting the agriculture sector, a specialized wells project has been designed to upgrade and rehabilitate 40 wells. This month the Project identified 40 beneficiaries. A detailed design to rehabilitate the wells using solar energy has been finalized and procurement will take place next month. This initiative will provide alternative energy options to enable 300 farmers working in the three export sub sectors [strawberry, herbs, vegetables] to cultivate over 200 hectares.

The Solar water Pump System will enable farmers to:

- Have stable and continuous electricity to operate the wells
- Reduce input costs (Fuel/electricity) and thus produce at competitive prices
- Have sustainable water for irrigation thus enhancing the quality of produce
- Compete in export markets

Fresh Herbs

USAID/Compete has conducted meetings with two Israeli export companies, Arava Export Growers and Viva Farmers, both showed great interest in buying Gaza herbs production for export. The estimated demand by the two companies is about 200 dunums. The market research confirms the growth potential and viability of this value chain and the current 30 dunums of cultivated land offer high potential for a scalability program to increase the production by at least 100 dunums by the coming seasons. The design for the scalability high-value production patterns program has been underway during February 2016. In the upcoming (March 2016) the Project will announce the program.

Vegetables

The USAID/Compete Project aims to support tomato and pepper farmers to export to the Gulf market. In order to achieve this, the quality of produce must increase. USAID/Compete plans to introduce netting to increase the production period and improve quality and also enhance post-harvest packing houses and cooling rooms to ensure optimal storage of vegetable products prior to shipment. For example, farmers need to replace plastic covers of greenhouses with netting, which will ensure higher yields and better quality due to improved ventilation. The Gulf market is more lucrative in the summer period, as summer is the off season for the Gulf region. For farmers to be able to produce in the summer period they need to change their current pattern of production. The Project identified an export company that buys from the farmers participating, storing around 1000 tons. The cold storage facility will ensure products collected by participating farmers will be refrigerated and the cold chain maintained enabling export. The design for the high-value production patterns program has been

underway during February 2016. In the upcoming period (March 2016) the Project will announce the program.

Strawberry Value Chain

In this reporting period, 21 farmers have been identified, approved and are ready to sign Letters of Assistance with the USAID/Compete Project. In Gaza, the export of strawberries is handled by four cooperatives; Charity Association for Vegetables and Flowers, Gaza Agricultural Cooperative for Production & Marketing of Vegetables, Farmer's Union Charity Cooperative and Beit Hanoun Agricultural Cooperative. With 100 dunums under new production patterns the Project anticipated 450 tons of high quality strawberries produced.

The purpose of the program is to introduce new strawberry production patterns that will increase the yield and enhance the quality. Financial analysis was conducted for various patterns and the single span Green house pattern was the most profitable. USAID/Compete intends to strengthen the strawberry sector in Gaza by introducing high production through technology, equipment and inputs, providing support to marketing firms, upgrading post-harvest facilities, introducing new processing facilities, and upgrading existing farms.

USAID/Compete has started the implementation phase of introducing new strawberry production patterns for up to 100 dunums of single span high greenhouses; this intervention will increase the yield per dunum from three tons (open field) to four and a half tons (single span high greenhouse). It is expected that the volume of exports overall will increase from one to two tons, and the local volume from two to two and a half tons per dunum. This project has received interest from 90 farmers through applications submitted to FLAP, recently LOAs signed with 34 farmers in January 2016 to start the first implementation phase, and during phase two 21 more farmers will sign LOA's with 45 to follow (66 total for phase two) based on our plan.

Computerized Hanging Strawberry Pilot Project

Eid Siyam (check name on Tamis) and Mahmoud Khlayil (Tamis check) will add three dunums each to a strawberry pilot project that aims to ensure the feasibility of hanging strawberry farms in relation to Gaza's specific economy and climate.

Fishing Sector

USAID/Compete will work to strengthen and scale up the fishing sector in Gaza by building the capacity of sea fishermen, scaling up onshore fish farms, and supporting the development of offshore fish farms. In this reporting period, the Project has concluded the design of two projects, for Fish Fresh and Kuhail Fish Farm.

Fish Fresh. Fish Fresh is the biggest onshore fish farm in Gaza, established in 2011 in the Khan Younis district. The company specializes in producing Denis fish (Sea Bream), with a production capacity of approximately 140 tons per year. USAID/Compete will support Fish Fresh to increase its production capacity by an additional 190 tons per year, and will increase its employment by 22 workers.

USAID/Compete has concluded the project design and business plan for expansion and the project is ready for implementation as the company's EDF has been approved. Installation of the remainder of

their cost-share inputs including water pools, greenhouses, leather lining has been completed. A purchase order will be signed in early March to supply them with generators and aerators.

Kuhail Fish Farm. Kuhail Fish Farm is the oldest on-shore fish farm in Gaza, established in 2006. The company also specializes in producing Denis fish, and its production capacity is around 30 tons per year. USAID/Compete has conducted a market assessment on the demand of fingerlings and developed a business plan for Kuhail on their production; both assessments confirmed the viability of the project.

The company possesses the expertise and interest to produce Denis fingerlings, which is the main market failure facing fish farming, resulting in limited growth of fish production in Kuhail Fish Farm and other onshore farmers. Support from USAID/Compete aims to tackle this major impediment and work with firms within the value chain via introducing fingerlings production in the Gaza Strip, which otherwise must be imported from Turkey or Israel for the area's fisheries. This intervention therefore will benefit the entire value chain, not only the direct beneficiary from this grant.

USAID/Compete will assist Kuhail Fish Farm through an In-Kind grant to develop a fish hatchery for Denis fingerlings for the benefit of the Gaza Strip fish farming value chain, as well introduce new alternative energy solutions (solar) to address persistent electricity disruptions that effect consistent production. USAID/Compete has concluded the project design and the Environmental Documentation Form (EDF) has been approved. A grant and purchase order were signed this month for the lab equipment. The vendor for equipment has been identified. Expected delivery will be in March- April 2016. Kuhail farm have also completed the installation of inputs as per the cost-share agreement. The design of the solar system was completed during this month and the procurement process commenced. The purchase order for the solar system will be issued in March 2016

Al Bahar Fish Farm. The second biggest onshore fish farm was established in 2015 near the coastal road of southern Gaza. The company specializes in producing sea bream "Denis" fish, its production capacity is around 100 tons per year. The local market is deemed the main market for the company. USAID/Compete will support Al Bahar to increase its production capacity by an additional 80 tons per year, and will increase its employment by 5 workers. The Project is waiting for Al Bahar to start preparing and grading the land to be used for this initiative. Once Al Bahar prepares the land the Project will sign an LOA which will see USAID/Compete's side of inputs committed expected in April 2016.

Abu Alnaja. Abu Alnaja and Associates Company was established in 1993. Abu Alnaja is planning to expand their business to include offshore fish (Denis) production by introducing Tension Leg Cages (TLC) technology. This new technology will enable Abu Alnaja to reduce the running and investment cost. On an offshore site, Abu Alnaja will need less electricity and will not require the processes and infrastructure for aeration. This company will be the first to employ this technology in Gaza, and is securing the permit from the Israeli Coordination and Liaison Administration (CLA) to operate within a certain distance from the shoreline. USAID/Compete will support Abu Alnaja in conducting a business plan for offshore fish farms and providing diving training courses in order to increase its production capacity by an additional 80 tons per year and its employment by 5 workers. Skilled divers are required for this type of offshore fishing as they set up the cages, sink them, provide feed, and extract the fish. This month an LOA was signed which includes Project support for a business plan and training in diving,

specifically for fish farms. For both the business plan and diving purchase orders (PO) will be signed in March 2016.

Information and Communications Technology Sector

The mandate of USAID/Compete's work in the ICT sector in Gaza is to increase the competitiveness of the sector to facilitate regional/international expansion and increase the number of new entrants in the software sector.

Strategic priorities will center on providing technical assistance to stabilize operations; enhancing access to market; strengthening the capacity of targeted firms/sectors to produce high value products and services; developing workforce skills and introducing new technologies; and providing business enhancement and institutional development support.

To date, USAID/Compete has received 51 ICT applications for firm level assistance from Gaza. Of these, six LOAs have been signed and two companies have enrolled in the Export Market Development Program. In addition, one company will be receiving support to become an Apple certified training center, a first in the both Gaza and the West Bank.

321 Boom. 321 Boom is a game startup from Gaza that has been registered since June 2015. The co-founders developed a concept character called Rayru, around whom they have built a game prototype (<http://www.rayru.321boom.net/>). The team applied for a competition organized by USAID for best game prototypes during a sponsored high tech hub conference in 2013. Their entry won first prize, for which they received a commitment from USAID/Compete to provide technical assistance to build the first project.

Currently the company has no proper management structure and little business or marketing knowledge, but does feature strong technical skills around gaming. As a new start up, 321 Boom does not have the financial resources to start the project, as gaming is a long-tail business for which full financial maturity and sustainability may take some time.

Under this LOA, USAID/Compete will assist 321 Boom in building its first full game for mobile devices, and will provide marketing assistance once it has been published on the relevant game app stores. Once the game development has been completed, USAID/Compete will assist 321 Boom to purchase advertisements on relevant websites like Amazon, GooglePlay, and the iTunes store, as well as membership subscription to a gaming organization to help them continue to stay informed and engaged with their market. The UPS has been delivered and a modified requisition of laptop specifications will be issued in March.

Netstream. The company is one of the Internet Service Providers (ISP) in Gaza. Its current market share is about 10% (6,500 clients) and it is the only ISP that provides TAJAWAL services via WIFI, overcoming restrictions of 3G infrastructure in addition to having a number unique services. Currently, they have their own call center but it is very limited. They are looking to set up an expanded call center as a separate investment unit to serve other clients, including the mother company. The potential clients

will be from local and regional markets. USAID/Compete will be assisting Netstream Company to improve their services by developing a business plan that measures the feasibility of expanding the service. An LOA has been signed and a vendor has been selected with work currently underway.

Vision Plus. Vision Plus is a training center in Gaza that has been operating since 2011. The company provides local training services in Gaza on Cisco, Microsoft and other IT topics. They also provide exams and certifications for young trainees. The company's customers are mainly youth who are trying to find employment in the local market. USAID/Compete will assist Vision Plus in opening a new MAC lab to introduce new training skills and topics in Gaza Strip as well as providing certification and training for trainers. The Project will also assist them in becoming an Apple certified training center. An LOA has been signed in January, the procurement process started, and work is underway.

UnitOne. UnitOne is a Business Process Outsourcing (BPO) company based out of Gaza since 2011. Significant portions of their staff are formed from their dedicated unit for women, which has around 50 people working in data entry and content translation. UnitOne has a small software division that has been providing services to the UAE, Netherlands, and US markets, and recently received interest from INTEL (Jerusalem) to start doing translation work. UnitOne is cooperating with IT companies in the West Bank to provide backup offices and counter instability in the Strip. UnitOne has future plans to open an office in Jordan. Compete will assist UnitOne via a professional consultant to conduct a niche market assessment and determination. This assessment will result in a detailed scope of work for a market research firm as part of the Export Market Development Program.

Modern Tech Company [MTC]. MTC is an ICT company established in 1994. The company works in website development and hosting, SMS, and specific software packages for certain industries. The company is evolving from a service-oriented to product-based company by leveraging the experience and network of customers they have built over the years. USAID/Compete will enroll the MTC Company in the Export Market Development Program by conducting an export market assessment for MTC's product named "Cloudy", which is an operation tool for collaboration.

Furniture Sector

In September 2015, USAID/Compete planned to provide limited support to firms working in the furniture sector to address the challenges they face, especially those with the capacity and growth potential to serve local and/or export market needs. The technical assistance program will target the entire value chain of the furniture sector and proceed with a comprehensive package of support for interventions based on market needs and building the foundation and infrastructure needed to enhance export potential and expand to new markets.

Accordingly, USAID/Compete completed a competitiveness assessment of the furniture industry in Gaza. In coordination with the Palestinian Wood and Industries Union, 20 companies that currently have the production capacity, staff, and quality resources were selected to participate in a survey to assess opportunities and challenges facing the industry, key materials, and drivers that enable increased production and successful export to historical markets. The survey was conducted in cooperation with the Palestinian Wood and Furniture Industries in Gaza who identified the top 20 exporters out of their affiliated members based on the export volume and export potential.

However, in light of the new Israeli restrictions issued in December 2015 on importing raw materials required for production (no wood more than 1 cm width and 5cm length can be imported to Gaza), Compete prepared a memo to USAID highlighting the current status of the furniture sector, the challenges companies are facing during the new restrictions, and the annual input amounts required for immediate operation by surveyed firms. High level negotiations between the international community and Israel are required to find a suitable mechanism by which firms can access the required raw materials. If progress is not made on this front, the ability of USAID/Compete to support the furniture sector will be marginal.

On the institutional level, USAID/Compete completed an institutional assessment for the Palestinian Wood and Industries Union that obtained baseline information on the unions' operating environment and identified the strategic and operational challenges facing the aforementioned unions. The assessment will enable the Project to determine the type of technical assistance and capacity building support needed for the targeted unions.

Textile and Garment Sector

USAID/Compete started to conduct meetings with Israeli buyers and the head of Textile and Garment Israeli Manufacturer's Association to gather information regarding the Israeli market demand and to examine the possibility of re-connecting with suppliers from Gaza. Both parties supported the idea of reconnecting with Gazan firms, as the quality is better than Chinese products. However the prices are much higher but can compete with Turkish products. This activity comes part of USAD/Compete efforts to build the competitiveness of garment and textile companies in Gaza to expand their market through improving the quality and introducing new varieties of products that are required for Israeli and West Bank markets.

To know more about the sectors' stakeholders and companies, the Compete Garment sector team plans to attend a Gaza textile sector business-to-business event where Gazan companies will meet with their Israeli counterparts. The event will take place on March 6th, 2016 in Jaffa. The meeting will take place within the activities of the Market Penetration Program – Enhancing Palestinian Exports to the Israeli Market, funded by the Norwegian Ministry of Foreign Affairs.

USAID/Compete plans to provide support to Golden Rock, one of the top 20 export companies identified, in buying new equipment, a Jeans Engraving Laser Machine, which will; enhance the quality of jeans production [denim and washed jeans], allow the company to produce new models and designs that match the trends as required from Israeli and West Bank buyers, increase the export



Project staff meet with garment and textile buyers in Israel to coordinate needs and requirements of produce, as well as their ability to buy once more from Gaza.

capacity of the company, reduce dependency in using traditional washing methods, and increase employment. An LOA will be signed once obtaining a preliminary approval from the ICA to enter the requested machine. USAID/Compete is expecting to sign more LOAs with vetted Gazan firms once assessments of those companies are completed.



A view of one of the traditional washing factories for jeans in Gaza which jeans producers currently use, the finishing however does not meet quality standards of buyers outside Gaza and updated processes are needed.

USAID/Compete conducted business

assessments of three washing factories that are specialized in washing jeans for almost all of the jeans producers in Gaza

to know their production capacity, assessment of current methods, and market share of each. More analysis is needed to know a true cost comparison between the laser method and their traditional method in addition to their current financial status including all costs and revenue. This assessment will clarify market challenges and the obstacles the value chain is facing in the garment sector.

USAID/Compete is in the process of conducting an institutional assessment for the Garment and Textile Union. The purpose of this assessment is to obtain baseline information on the unions' operating environment, identify the strategic and operational challenges facing the aforementioned unions and eventually enable the project to determine the type of technical assistance and capacity building support needed for the targeted unions. The assessment results will be shared with the union once the beneficiaries will be vetted.

Tourism Sector

USAID/Compete will work with the Tourism sector in Gaza to develop strategic business and management plans and enhance production and quality systems. The program will also provide training in areas critical to improving performance. Through February 29, 2016, the Project received 30 applications and will proceed with application assessments in March 2016. Of those applications, 25 draft company profiles have been sent by interested firms with 5 company profiles fully completed.

This reporting period, February 2016, the Tourism Sector Lead proceeded with application assessments of the firms who applied under FLAP. In addition, the Tourism Sector Lead conducted field visits to six companies to verify the information submitted as part of their company profiles as well as to discuss the needs and possibilities of supporting these companies. Preliminary market research was conducted to examine the availability of service providers in the local market.

In addition, a meeting was conducted with the Palestinian Committee for Hotel, Restaurant and Touristic Services to go over survey results for the training assessment conducted by the Committee.

This assessment will help in designing and implementing a capacity building training program for the tourism sector in areas critical to improving performance. Another meeting was conducted with one potential local service provider that might be a candidate for delivery of the training program. Follow up will continue in this regards with the Committee to agree on the specific training topics that will be delivered once program design is complete.

The USAID/Compete Tourism Lead also visited three hotels; Al Mathaf, Blue Beach resort and Al Mashtal hotels, to better understand industry performance. The main findings were that the industry market size is small due to limited disposable income in Gaza; however, supporting the firm level applicants will help them reduce operational costs and enhance business performance efficiency.

The following table provides a breakdown of progress towards ongoing activities in Gaza as of the end of February 2016:

ONGOING ACTIVITIES IN GAZA: From October 2015 until February 29, 2016				
Sector	State	Strategy	Ongoing Activities	Current / Anticipated Impact
Agri-business: Cross-Cutting	<ul style="list-style-type: none"> Lack of adequate access to water or energy 	<ul style="list-style-type: none"> Provide technical assistance to select firms and equipment / inputs to enhance access to water Provide technical assistance and/or equipment to enhance access to alternative energy sources 	<ul style="list-style-type: none"> Over 60 fully licensed-wells have been identified The design of three wells has been finalized in order to accommodate heads and flow quantity for all the wells. The specifications of the system components will be submitted to ICA in order to obtain preliminary approval to facilitate entering the required items to Gaza. 	<ul style="list-style-type: none"> 40 wells will be operating with solar energy supporting at least 2000 dunums of productive land
Agri-business: Fresh Herbs	<p>In 2015:</p> <p>30 dunums, 60 tons, 5 farmers</p> <p>Basket consists of 3 varieties</p>	<ul style="list-style-type: none"> Scale up Fresh Herbs Farms Introduce new products and technologies Enhance post-harvest facilities 	<ul style="list-style-type: none"> The scalability high-value production pattern of fresh herbs has been designed and presented to relevant cooperatives and local export companies. The program will be announced in March. Market demand assessment completed: <i>2 Israeli exporters (Arava, Viva) expressed demand for 300 dunums / 600 tons production.</i> 	<ul style="list-style-type: none"> 100 dunums (200 tons) Basket consists of 6 varieties \$1 m of exports
Agri-business: Vegetables (potato, carrots, tomato, pepper)	<ul style="list-style-type: none"> Lack of proper post-harvest packing and cold chain facilities. Limited markets (Israel & WB) 	<ul style="list-style-type: none"> Introduce new products and technologies Enhance post-harvest Facilities Establish Vegetable industries 	<ul style="list-style-type: none"> One exporter has been identified to establish a cold storage facility to enable export. Procurement is underway The scalability high-value production pattern of vegetables has been designed and presented to relevant cooperatives. The purpose is to enable farmers sustain the Gulf market during the summer. 	<ul style="list-style-type: none"> Adequate post-harvest facilities established by May to export to Gulf High-value production patterns using netting established (200 dunums) installed by May for about 80 farmers Expanded Summer exports to Gulf markets (additional 600 tons)

<p>Agri-business: Strawberry</p>	<p>In 2015: 900 dunums yielding 2700 tons</p> <ul style="list-style-type: none"> Limited markets Lack of high value productions patterns 	<ul style="list-style-type: none"> Introduce high production patterns Support marketing firms Upgrade post-harvest and introduce processing facilities Upgrade existing farms 	<ul style="list-style-type: none"> Indoor (small green houses) Strawberry Scalability Program (90 full applications; 55 approved and LOA signed with 34). Another 12 are ready to be presented to the panel in March Two pilot projects have been approved for hanging strawberry systems. Procurement is in the process. The specifications of the system components will be submitted to ICA in order to obtain preliminary approval to facilitate entering the required items to Gaza. Business plans developed and completed. 	<ul style="list-style-type: none"> 100 dunums under new production patterns yielding 450 tons of high quality strawberries 6 dunums under new production patterns [hanging strawberry system] yielding 60 tons of high quality strawberries
<p>Agri-business: Fish</p>	<p>On shore</p> <ul style="list-style-type: none"> 3 fish farm (260 tons) lack of fingerlings 	<ul style="list-style-type: none"> Scale-up onshore fish production 	<ul style="list-style-type: none"> Two fish farms were approved to expand production. LOA signed with one of the companies. The LOA of the second farms will be signed in March. PO to be signed in March for both farms. Support establishment of the first fingerlings lab. Grant has been signed. PO of lab equipment signed and solar system is under procurement to be finalized in March. 	<ul style="list-style-type: none"> 270 additional tons of fish to market One fingerlings farm established (1m fingerlings/annum) 30 new jobs created Increase in sales by USD \$3.5m
	<p>Off shore</p> <ul style="list-style-type: none"> Untrained personal Lack of fingerlings 	<ul style="list-style-type: none"> Support development of offshore fish production 	<ul style="list-style-type: none"> Business plans and training for 6 divers. PO signed with the consultant to conduct business plan. PO of the diving training will be signed in March. 	<ul style="list-style-type: none"> 6 divers trained Trained staff to install an off shore farm
<p>ICT</p>	<ul style="list-style-type: none"> Business instability due to public infrastructure, market disconnect and weak business tools Lack of qualified workforce, pipeline Limited access to market 	<ul style="list-style-type: none"> Enhance access to market Development of workforce capacity Enhance access to finance 	<ul style="list-style-type: none"> So far, 17 companies have been assessed and 5 companies have signed LOAs. One LOA has been cancelled due to inability of the firm [Effects] to start the implementation process of the activities. Approved support for one training center to become Apple Certified training center (the first in West Bank and Gaza) Two companies enrolled in export market development program One company [321 boom] started developing the product after receiving UPS and Wacam One company [Vison Plus Company] started purchasing furniture and placed order for six Mac machines. One company [Developers Plus] is in the process of conducting solar assessment through Compete Solar Consultant. Vendor has been selected for Netstream to conduct Business plan. The work is underway and expected to be completed in mid of April. 	<ul style="list-style-type: none"> Introduction of training for new skills in the market Assisting startups in developing new products and services Stabilize business operation for companies Expansion into new markets and signing new contract. Develop new products and services

Furniture	<ul style="list-style-type: none"> September 2015 increased restrictions on dual-use list of required imports Lack of market access Declining workforce, moving to other sectors Weak support institutions Lack of quality assurance and management systems 	<ul style="list-style-type: none"> Build capacity and enhance access to market for select firms Enhance capacity of Furniture Association 	<p>On hold until facilitating entering the required raw materials. So far, Compete has done the following:</p> <ul style="list-style-type: none"> Identification with Union of top 20 export-ready firms (complete) Current State and Needs Assessment of 20 export-ready firms, incl. sales, exports, partnerships, material requirements, marketing information (complete) Assessment of Furniture Union (complete) Assessment of dual-use restrictions list as relate to firm production requirements (complete) 	<p>In the absence of a mechanism to address dual-use restriction list of items needed for production, Compete is limited in its ability to positively affect this sector moving forward.</p> <ul style="list-style-type: none"> Strengthened Furniture Union in Gaza Enhanced Furniture Union ability through providing better services to their respective sectors
Garment and Textile	<ul style="list-style-type: none"> Lack of market access Declining workforce, moving to other sectors Weak support institutions Lack of quality assurance and management systems 	<ul style="list-style-type: none"> Build capacity and enhance access to market for select firms Enhance capacity of Garment & Textiles Association 	<ul style="list-style-type: none"> One company has been assessed during the panel. LOA will be signed once receiving preliminary approval from ICA to enter the required equipment [Engraving Laser Machine] to Gaza. Field visits have been conducted to the Gaza suppliers to verify the information and ensure the readiness to export and engage with more buyers from West Bank and Israel. Three assessments have been conducted to the Jeans washing factories to gather information regarding their current capacities and their technical assistance needed to improve their quality and production. A meeting with the Israeli Manufacturer's Union for Garment and Textiles has been conducted to gather information regarding the Israeli markets needs and the possibility of reconnecting with Gaza suppliers. A meeting has been conducted with Gisha Human Rights Organization to gather information regarding movement and access for businesspersons and goods across Gaza border for trade to Israel, Visits have been conducted to the potential Israeli buyers. Israeli and West Bank market research interviews completed Gaza company sample collection completed Gaza company data verification & pictures completed Assessment of Garment & Textile Union will be completed in Mach Identification with Union of top 20 export-ready firms (completed in Jan 2016) 	<ul style="list-style-type: none"> Established and/or increased export with Israeli and West Bank buyers Enhanced technical capacity of key Garment firms Strengthened the Textile and Garment Union in Gaza Enhanced Textile and Garment Union ability through providing better services to their respective sectors

			<ul style="list-style-type: none"> • <i>Current State and Needs Assessment of 20 export-ready firms, incl. sales, exports, partnerships, material requirements, marketing information (completed in Jan 2016)</i> 	
Tourism	<ul style="list-style-type: none"> • Constant political instability • Weak support institutions • Lack of quality assurance and management systems 	<ul style="list-style-type: none"> • Build capacity and enhance access to market for select firms • Enhance capacity of Tourism Association 	<ul style="list-style-type: none"> • Internal assessment of business opportunity for domestic tourism is in the process. • Activity development utilizing FLAP to address needs is in the process • Conduct assessment of Tourism Association completed 	<ul style="list-style-type: none"> • Enhanced technical capacity of tourism firms • Strengthened the Tourism Union in Gaza • Enhanced Tourism Union ability through providing better services to their respective sectors

APPENDIX A: LIST OF TRAININGS AND WORKSHOPS

DATE	EVENT	TOTAL PARTICIPANTS	NUMBER OF FEMALES	NUMBER OF MALES	TYPE OF EVENT
02/16/2016	SAP GRADUATION	52	11	41	CONFERENCE
02/24/2016	AGRONOMIST GRADUATION CEREMONY	46	8	38	SEMINAR
02/24/2016	GAZA FRESH HERBS PROGRAM ANNOUNCEMENT	10	0	10	MEETING
02/24/2016	GAZA VEGETABLES PROGRAM ANNOUNCEMENT	12	0	12	MEETING

APPENDIX B: CALENDAR OF UPCOMING EVENTS MARCH 2016

March 2016						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2 USAID DAA Stephanie Blume Visit to Toubas and TUPACK	3 US Consul General Visit to Beit Fajar	4	5
6	7	8	9	10	11	12
13	14	15	16	17 PIP Cycle 3 – Closing Event	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Key: Agribusiness - Tourism - ICT - Stone and Marble	