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QUARTERLY REPORT

YEAR 1 QUARTER 1 (FY2016 Q1)

SEPTEMBER 30 – DECEMBER 31, 2015



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FRONT COVER: ZIPhouse students working in the ZIPhouse production area, Oct 2015
PHOTO CREDIT ZIPhouse

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ACRONYM LIST

AA	Association Agreement
ANTRIM	National Association for Inbound Tourism
ANAT	National Association of Travel Agencies of Moldova
APIUS	Employers Association of Light Industry
ASEM	Academy of Economic Studies of Moldova
ASW	Association of Small Wineries
ATIC	Moldovan Association of Private ICT Companies
B2B	Business to Business
B2C	Business to Company
BSP	Business Service Provider
C&M	Cut & Manufacture
CEE	Central-Eastern European
CEED I & II	Competitiveness Enhancement and Enterprise Development I & II
CIS	Commonwealth of Independent States
COP	Chief of Party
DCFTA	Deep and Comprehensive Free Trade Agreement
DCOP	Deputy Chief of Party
DMS	Destination Management Company
DO	Development Objective
ECP	Expert Coaching Program
EIB	European Investment Bank
EU	European Union
ICT	Information Communication Technology
IR	Intermediate Result
ISSPA	State Inspectorate for Controls over the Wine and Alcoholic Products
ICT	Information and Communications Technology
ICTCE	ICT Center of Excellence (Tekwill)
JAA	J.E. Austin Associates
LOP	Life of Project
MAFI	Ministry of Agriculture and Food Industry
MCCI	Moldovan Chamber of Commerce Industries
M&E	Monitoring and Evaluation
MICE	Meetings, Incentives, Conferences, and Events Tourism
MOE	Ministry of Economy
MOU	Memorandum of Understanding
NTA	National Tourism Agency
ONVV	National Office of Vine and Wine
PDO	Protected Designation of Origin
PGI	Protected Geographical Indication
PIRS	Performance Indicator Reference Sheet
PMP	Performance Monitoring Plan
PMU	Project Management Unit
PPP	Public Private Partnership
PR	Public Relations
RFP	Request for Proposal
SEED	Sector, Engagement, Enhancement, and Development Fund
SME	Small and Medium Enterprise
STTA	Short-term Technical Assistance
SWM	Startup Weekend Moldova

TOR	Terms of Reference
TR	Technical Regulation
TOT	Training of Trainers
ULIM	Free International University of Moldova
TUM	Technical University of Moldova
USAID	United States Agency for International Development
USD	United States Dollar
USG	United States Government
VET	Vocational Education Training
WFD	Work Force Development
WoM	Wine of Moldova

EXECUTIVE SUMMARY

Chemonics International Inc. (Chemonics) and its partners, J. E. Austin Associates, Inc. and Bhavana World Project, are pleased to submit to the United States Agency for International Development in Moldova (USAID/Moldova) this Quarterly Report for the USAID Competitiveness Project. This quarterly report presents progress during the first quarter of the project, September 30 through December 31, 2015. Below is a summary of the highlights that occurred during the reporting period.

Wine & Tourism

- The project has developed and started implementing the following support programs: Support Program for Associations of Small Winemakers (ASW) and Product Quality Upgrading Program that aim to support quality management and laboratory services for operating wineries that face quality and technology issues. The Project launched the skills gap assessment in the wine sector in collaboration with JE Austin International consultant and performed an initial assessment of the reforms initiatives in education in collaboration with the Ministry of Agriculture and Food Industry of Moldova (MAFI).
- Supported National Office of Vine and Wine (ONVV) in the implementation of the electronic wine & vine traceability system, by hiring a local IT firm to provide four trainings for 34 participants and initiated the support to ONVV in the development of software for random allocation of tasters for tasting committees and tasting session recording by subcontracting a local IT company.
- A video commercial for a Wine of Moldova communication campaign has been developed and fully produced. Furthermore, a collaboration with consultant, Robert Joseph, has been defined for the elaboration of a communication plan for Wine of Moldova and the implementation of an extensive quality assessment exercise. Additionally, a local consultant has been hired to provide written content for new Wine of Moldova website and a new portal is being developed for Wine of Moldova and ONVV activities.
- Assisted ONVV and ASW to participate in the Good Wine 2015 event held in Romania by organizing a PR campaign and two dedicated master classes for the Moldovan Author-wines. A total of 94 wine journalists and professionals attended the Author-wine master classes and more than 5,000 persons visited the Wine of Moldova stand at GoodWine trade fair.
- Assisted ONVV in planning and strategizing on the participation of Wine of Moldova at ProWein 2016 in Germany through financing the participation and technical assistance in communication plan development. The project co-financed the expenses for the implementation of the ProWein participation plan.
- Organized the first wave of accreditation and communication under the generic name of "Wine Friendly" program, which included: 12 partner-restaurants; five sommelier trainings for the restaurants' staff; 17 master classes for wine amateurs; 17 bloggers and six local sommeliers involved in the master classes, about 650 participants tasting 360 bottles of wine from 12 participating wineries, and 750 thousands of impressions generated by the 7 videos on wine & food pairings. The project assisted the ONVV in the organization of the 9th edition of Wine Vernissage, in which participated 36 wineries, 1,200 visitors, and 200 premium wines have been showcased.
- Three normative acts implementing the wine legislative reform have been successfully promoted by ONVV to MAFI and the Government. One Regulation on the organoleptic product quality assessment has been approved by the Government decision and published in the *Official Gazzette (Monitorul Oficial)*.

- Supported the ONVV to become the main professional organization in the wine industry by embedding a local communication consultant in the ONVV, who was empowered to implement the institutional communication strategy and launched the implementation of the marketing & business intelligence services to the wine industry.
- Assisted premiere participation of 6 Moldovan tourism operators to IBTM Barcelona MICE Fair (November 16-18, 2015), a reputed and influential trade fair for MICE (Meetings, Incentives, Conference and Events) business. MICE is a new, but promising, segment for Moldovan tourism. Exposure to IBTM Barcelona is important as the Project will continue supporting in Q2 the MICE industry to define the positioning of Moldova's MICE products/services in a strategic roadmap.

Light Industry

- Developed and launched the implementation of policy and operations manuals, guidelines, and job descriptions for the main ZIPhouse areas. Ziphouse Communication & Event organization and ZIPhouse access & pricing developed
- Conducted a study tour for ZIPhouse and several Project staff members to explore and learn from similar accelerators and excellence centers. Participants visited 10 institutions and learned about their best practices and already started implementing lessons learned.
- Subcontracted Creatego to provide consultancy and implementation services on digital marketing and branding for ZIPhouse, in order to help establish stronger brand identity and efficient communications channels with partners and beneficiaries.
- Contracted Italian expert in Fashion Design, Francesco Veneziano, to help enrich education for light industry, by establishing joint degree program for Fashion Design students and specific programs for professionals. Consultant's visit in December resulted in draft recommendations and an action plan that include preliminary steps for signing the memorandum of collaboration with one or several universities from Italy.
- ZIPhouse held about 20 workshops and events with 400 people attending.
- ZIP House held "Inspiring Women in Fashion Business", highlighting success stories of five local brands to students and young professionals. U.S. Embassy in Moldova Deputy Chief of Mission (DCM), Julie Stuftt, highlighted U.S. Government (USG) support to industry and press. A capacity building program was launched for ZIP House, and the first 20 students became residents of the center, by signing up for a monthly subscription.
- Launched the Fashion Cappuccino, representing a series of community building and knowledge sharing events at ZIPhouse.
- Started the preparation of apparel, footwear and accessories companies for participation at international exhibitions under the Din Inima umbrella brand: GDS, Dusseldorf; Red Carpet, Dusseldorf; Leather&Shoes, Kiev; Bijnorka, Paris; TEXTILLEGPROM, Russia; Premier Vision, Paris.
- Launched the productivity coaching program with a study visit for 11 apparel companies to SORSTE manufacturer in Romania (November 25-26). Producers learned about workflow planning and organization, employee motivation and retaining, and technical/technological innovations.
- Launched the implementation of the innovative methods for workplace organization in five small apparel companies.
- Apparel companies started the opening of a common brand store on Stefan cel Mare Street in Chisinau, Moldova.
- Contracted marketing strategist, Olga Radu, to work with the Project and Light Industry Association (APIUS) as the key beneficiary in developing a marketing strategy and a PR plan for 2016 for the Din Inima brand/campaign.

Information and Communications Technology

- Moldovan Association of Private ICT Companies (ATIC) received assistance in strengthening internal regulations and to conform with the USAID regulations in order to establish and manage the ICT Excellence Center (Tekwill).
- Developed the English version of the Legal Pocket Guide, which will be available to the members of ATIC and potential foreign investors in the local ICT sector.
- Launched the ICT Skills Gap Assessment as a means to help tailor the future Project interventions in university education improvements.
- Expanded the Educational Robotics program (Roboclub), as a component of Science, Technology, Engineering and Math (STEM) Education modernization. An introductory training for future robotics teachers and a training for the coaches of FLL teams were conducted. Eight new institutions were selected for endowment with robotics kits and inclusion in the Roboclub program.
- The Project provided mentorship to ATIC/Tekwill in order to organize a new edition of Startup Weekend Moldova (SWM), included in their events plan. SWM is an entrepreneurial education event, part of the efforts to promote risk-taking culture and develop entrepreneurial ecosystem in Moldova.
- In order to facilitate the creation of favorable infrastructure for IT entrepreneurship, the Project started to provide technical assistance for a private IT Park development (main investor/counterpart being Starnet Company).
- Initiated a needs assessment of IT products and services for the companies from non-IT industries and conducted interviews with a sample of non-IT companies to assess their IT needs.
- Developed the marketing coaching program concept to strengthen marketing skills of domestic IT companies. The marketing program will be implemented by an already identified consultant.

Cross-Cutting Activities

Workforce and Innovation

- The workforce skills gap analysis for all the Project supported industries was launched. Skills Gap Analysis aims to identify the gaps in the set of skills and competences that undermine the current industry-level performance and to determine the level of competitiveness. Preparatory stage of skills gap analysis (desk research and preliminary interviews) and First stage of skills gap analysis (focus groups activities) was performed together with representatives of Subcontractor JAA. The Terms of Reference for the Second stage of skills gap analysis (survey of selected sample of companies) were developed and a Magenta Consulting SRL was selected as subcontractor for the implementation phase. The Third stage of skills gap analysis (in-depth interviews/focus group discussions with most relevant reps of industry and public institutions) and the Final stage of skills gap analysis (report writing and public presentation of results) will be carried out after the presentation of survey results.

Sector Engagement, Enhancement, and Development (SEED) Fund

- The \$ [REDACTED] SEED Fund is designed to invest in targeted activities to enhance local capacity and spur innovation in the wine and tourism, ICT and light industry sectors of the Moldovan economy. The Fund will be used to support productivity and quality upgrades, promote workforce development, support technology upgrades, facilitate market linkages, and enhance public-private dialogue. The Project will aim to award grants that support innovative new approaches, technologies, and products that can be used as models for other firms, non-government organizations, or educational institutions. During Q1, FY 2016 of Program Year 1, the SEED Fund focused on presenting in a timely manner contractual requirements for USAID approval, conducting

grants trainings with all staff, structuring the SEED Fund team, and planning future activities, while keeping in mind the sustainability of these activities.

Development Credit Authority (DCA) Activity

- The Project initiated communication with 2 financial institutions implementing DCA activities, that have been assisted by the USAID CEED II Project up until its conclusion in June 2015. The DCA portfolio utilization rates keep improving: Comertbank registered 47.60% of cumulative utilization, while Prime Capital increased its cumulative utilization to 82.78% for activities that support ICT sector as well as women and young entrepreneurs; and a utilization of 9.31% for the DCA portfolio in energy efficiency activities.
- One meeting with the Comertbank management took place in order to discuss the status of the DCA, future collaboration, and ways to improve DCA utilization by the March 31, 2016 deadline for the Placing Qualifying Loans under Coverage. As result, Comertbank expressed great interest to start a new DCA agreement.
- Two monitoring visits at Comertbank and Prime Capital were organized to review performance and achieved results, to ensure that the DCA is utilized properly as well as to determine the outputs, outcomes and impact of DCA guarantee usage.

SECTION I

TECHNICAL ACTIVITIES DURING FY16 Q1

Q1 of Project Year 1, which represents the startup phase of the USAID Competitiveness Project, kicked off to a strong start defining the tone of and implementation rate for the Project. Below is a summary of progress to-date by target industry, discussing project accomplishments, problems (if encountered) and solutions. We also list all deliverables submitted during the period. In Section II, we present key results and impacts and report progress against PMP targets. Section III contains a summary of our planned activities for the next quarter. Section IV contains a report on the level of effort (LOE).

A. ACCOMPLISHMENTS, SCHEDULES, AND PROBLEMS

A1. WINE AND TOURISM

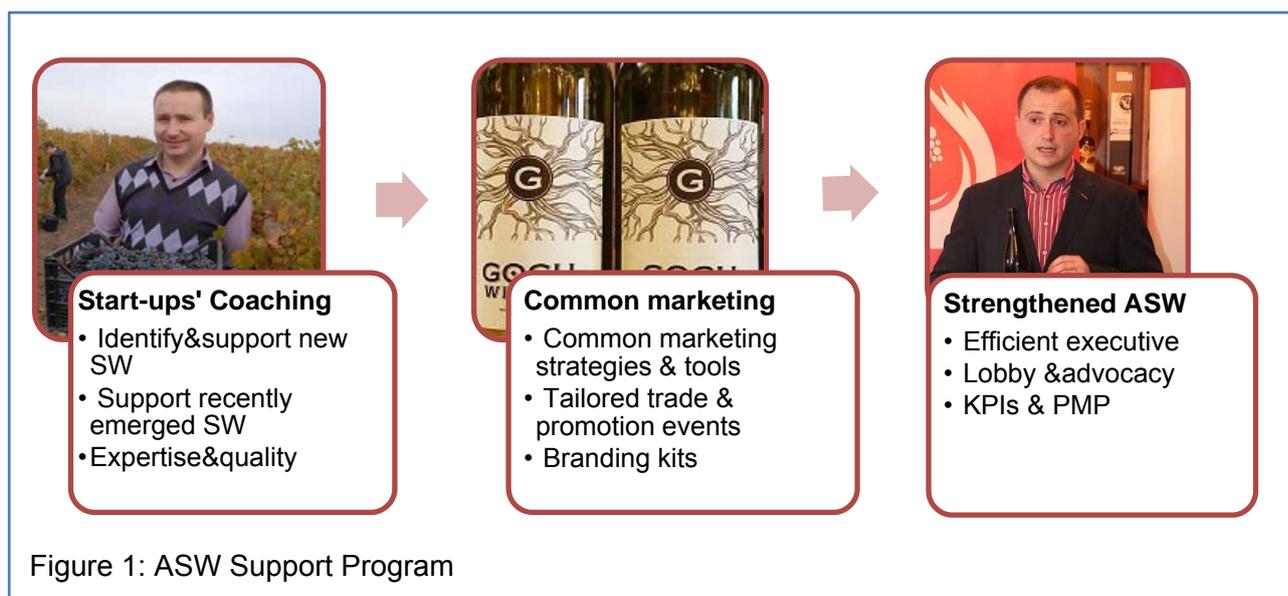
A1. Objective 1: Increased Productivity and Quality (Better Workforce and Adopted Innovation)

A1.1. Activity 1: Upgraded Wine Quality and Better Trained Workforce in the Wine Industry

Identify new small wine producers and support their successful startup. Currently, there are only about 10 small wineries (micro-enterprises) in Moldova, most positioned as boutique wine producers. The USAID Competitiveness Project supports the Association of Small Wine Producers (ASW) to identify potential new small wine (SW) producers whose start-up could be supported by the Project. 6 new small wine producers have been identified and will receive project support, resulting in high quality author-wine compliant with the ASW quality framework.

Within the reporting period, the project has developed the conceptual approach towards the implementation of the “ASW Start-up Coaching program”, which was endorsed by its members and is organically included in the Project’s support program aimed at the small wine producers. Also during the reporting period, the ASW re-elected its Chairman and executive board for a new mandate which will ensure the appropriate implementation of the ASW Support Program (see figure 1 below).

The implementation of the ASW Start-up Coaching program includes the following phases: (i) identification of the new & potential small wine producers that could participate in the start-up program (*by the end of February 2016*); (ii) development of support kits for each of the start-ups enrolled in the program (*March 2016*); (iii) deployment of the project’s support as: local and foreign consultancy; trainings; services and tools, etc. (*by the end of 2016*).



Improve wine industry workforce for a higher quality product. The wine and tourism cluster faces immediate shortages in skilled workers, considering that most of the industry's workforce was trained using Soviet curricula and is not acquainted with modern practices and technologies. The change of the industry product quality paradigm - from high volumes to higher quality - demands the adaptation of sector's workforce skills and capabilities to the new needs of the wine industry.

The project initiated the plan of providing support in developing the wineries' workforce through customized support, including coaching, mentorship and expert consultancies in viticulture, winemaking, quality management, laboratory services, etc. This initiative, entitled as "Product Quality Upgrading Program" (PQUP), has been outlined into an activity concept note, which has been agreed with the ONVV specialists.

The PQUP concept is based on the following considerations:

- The Moldovan wine industry is composed by a diverse range of clusters: grape producers (small, medium and large cooperatives); grape processors (bulk wine producers); bulk & bottled wine producers (with mediocre quality and unsuitable winemaking technologies); 1st tier of bulk & bottled wine producers (with average quality of bottled wine and admissible quality of bulk wine, mostly suitable for Commonwealth of Independent States (CIS) standards); 2nd tier of bottled & bulk wine producers (with a good quality of bottled and bulk wine, mostly oriented to non-CIS markets); 'wine champions' (producing high quality bottled wines); and the small wine producers (author wines).
- Despite the fact that there are about 10 Moldovan wineries able to produce high quality wines, about 80% of the wine producers are still facing quality problems, mainly due to lack of and poor knowledge of winemaking technology; problematic quality management systems and incoherency between marketing and production strategies. Many of these producers own vineyards and have a fairly acceptable winemaking technology. Still, the quality of the produced wine remains mediocre. This type of wine producers is in need of support in upgrading their workforce capacities, winemaking technologies and re-orient their products in new portfolio segments and new markets. This will have an essential impact on the average

- product quality in the Moldovan wine industry, allowing it to expand the national wine portfolio and become more competitive on the EU markets.
- Some grape producers that own good vineyards of a surface allowing them to produce sufficient competitive volumes may be interested in migrating to a new business model, and start producing wine. They will be able to gain higher revenues from the additional product margin and could have a strong impact on the wine industry product quality.

The Project, together with the ONVV specialists, have identified a preliminary list of about 15 wineries that are representative of the 1st and 2nd tier of the bulk & bottled wine producers.

Also, the Project has identified local and international potential experts to be involved in the PQUP and to provide assistance to the PQUP participants and has developed the implementation plan for the activity, which includes the following phases:

- I. The identification of the potential PQUP participants (*done in December 2015*)
- II. The PQUP participants' audit (*January - February 2016*) – during this phase the project's specialist together with the ONVV experts will visit the PQUP candidates and assess their situation and commitment to upgrade product quality. The main areas for assistance will be identified and a decision about including into the PQUP will be made;
- III. The definition of the PQUP support kit: for each participant a tailored program of assistance will be designed by the experts and a MoU of commitment will be signed with each of the companies. (*March 2016*)
- IV. Deployment of the PQUP support: including viticulture, winemaking, management & marketing support (*by the end of 2016*). It is expected to provide support to up to 10 companies, including wineries and grape producers.

Design Wine of Moldova Academy. The Wine of Moldova Academy aims to address the continuous education needs in the wine industry. The design of the Academy will integrate the lessons learned from the wine sector skills gap assessment and the industry's objectives, and also will be supported by subcontractor, JAA. The academy will be established as a service to be provided by the ONVV to the sector.

The Project made a preliminary assessment on the current initiatives in reforming the education related to wine industry requirements. It has been found that there are three ongoing projects in wine education, out of the EIB "Filiere du Vin" Credit line: 1) the Professional School of Nisporeni (\$730 thousand), 2) the Professional School of Leova (\$300 thousand) and 3) the Moldova Technical University (\$ 1,5 million). Additionally, a credit line was set up for the National Institute for Vine and Wine, responsible for the research in the wine sector (\$600 thousands). Also, the National College for Viticulture and Winemaking of Chisinau (CNVVC) has initiated a restructuring program, including the project for the development of a Viticulture & Winemaking Excellence Centre (CNVVC Excellence Centre), requiring an investment of about \$3,5 million.

The preliminary assessment showed that the above referenced investments are made without having a fully integrated and comprehensive vision and strategy regarding modernizing and upgrading the viticulture & winemaking education at the national level. Moreover, the wine industry workforce needs have not been assessed in order to better align curricula and graduates' qualifications with industry needs.

The project was able to leverage its efforts with MAFI to start an assessment of the referenced investments in the wine sector education and determine the best way to align viticulture educational content with the needs of the industry.

In December 2015, with the participation of academia, wine producers, ONVV and the MAFI the project initiated a wine industry skills gap analysis along with international expert, Karen Isahakyan, from J.E. Austin, who assessed the current situation of the wine industry workforce supply and demand.

A1.1. Activity 2: Support Development of the Stauceni Viticulture and Winemaking Excellence Center (SEC)

Support SEC development. The project aims to address the need for skilled viticulture personnel by supporting the development of SEC in line with some of the most viable and applicable to the Moldovan context international models (i.e. Austria, Italy, and Germany).

As a first step, the project will support MAFI in developing a feasibility study for the SEC Center. However, considering the challenging political situation in Moldova and the need for a credit line, the Project decided to wait for a new Minister of Agriculture to be appointed before moving further with this project.

A1.1. Activity 3: Bring IT to the Wine Industry to Upgrade Productivity and Quality

Implement digital wine traceability. Wine producers in Moldova are required by law to ensure wine traceability through wine registrations and declarations. Until recently, most tracking has been paper-based, which is labor-intensive and does not garner credibility or sustainability. With support from the CEED II project and EIB technical assistance, the ONVV developed a software program for an electronic traceability system, which will allow the system to connect to the State Vine and Wine Registry and users will be able to submit electronic requests and declarations.

USAID Competitiveness Project contracted a local IT company to support the ONVV in implementing the electronic wine & vine traceability system, by installing the software at wineries and providing on-site and end-user trainings and seminars and organizing help desk support. With project's support 4 such seminars have been organized during the reporting period for a total of 58 employees of 34 Moldovan wineries that are willing to implement the new IT solution to enhance their internal wine traceability. During the seminars, the initial feedback on software usability was collected, which resulted in the implementation of a round of updates. Trainings and seminars on the newly updated software will continue in Q2.

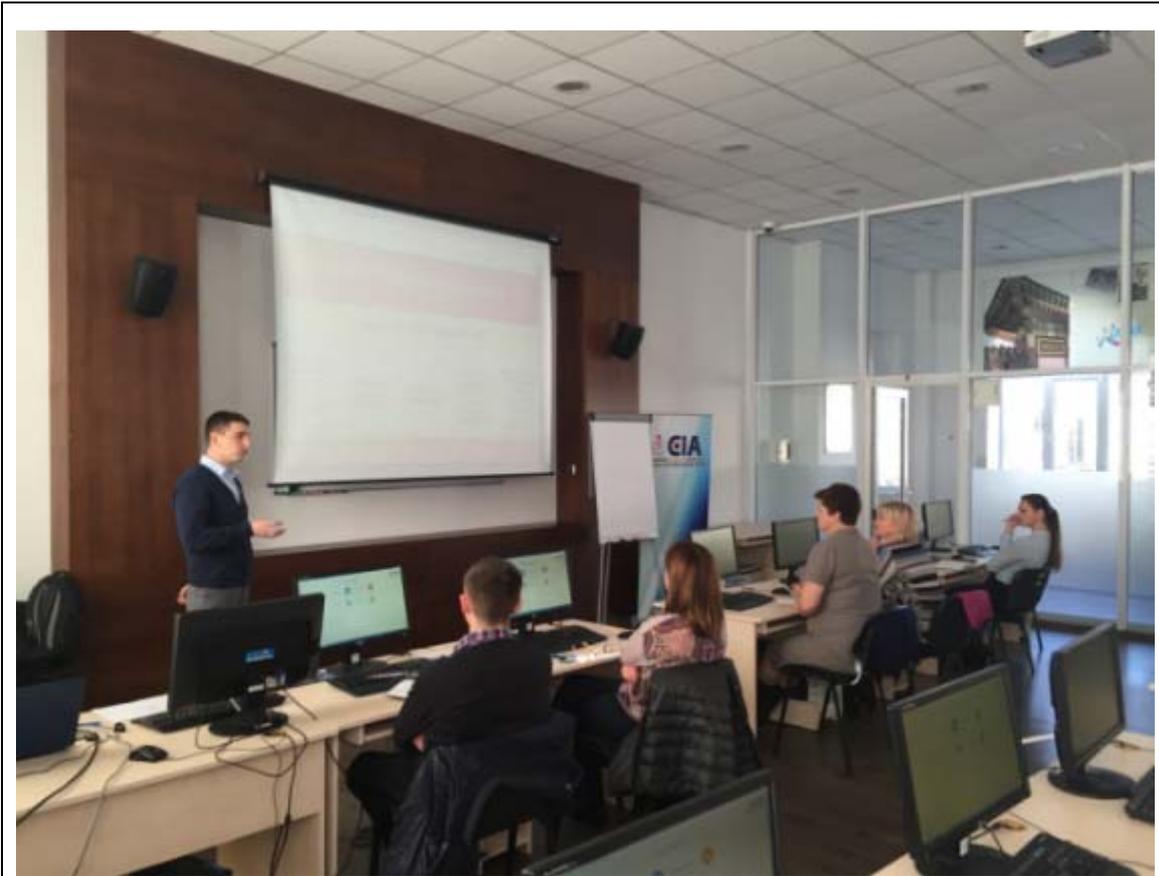


Photo credit: ONVV

Photo caption: Stefan Iamandi, ONVV Vine and Wine Register specialist, giving an introductory note to winemakers present at electronic traceability system seminars, Chisinau, November-December, 2015

Support development and implementation of IT solutions for vineyard management and product quality monitoring. Wine producers are challenged to manage a large amount of data in their production processes, which is necessary to ensure product quality. Beginning in March, USAID Competitiveness Project will research software solutions to monitor and manage production processes. If none exist that fit the needs of the Moldovan wine sector, the project will support the development of a tailored software solution.

Support the development of an IT solution for random allocation of tasters for organoleptic analysis. The ONVV, supported by USAID, has developed a new regulation on organoleptic assessment of wine products. This new assessment process is in line with EU standards and is designed to exclude inefficiencies of the previous system, such as lack of professionalism, subjectivity and corruption. USAID Competitiveness Project decided to support the development of a software solution that randomly selects the tasters and keeps track record of the sampling sessions. Based on an open competition process, an IT company has been contracted, kick-off meetings conducted, project plan developed and first wireframes of the web-based software developed.

The IT solution for random allocation of tasters will be executed by the end of February 2016 and will be implemented within the official procedures of wine conformity assessment, the certification of wines with PGI/DPO and the wine country brand. The use of the IT solution will reduce drastically the subjectivism and corruption in wine quality assessment and will increase confidence of the wine producers as well as consumers in the wine industry regulatory bodies.

A1.1. Activity 4: Support Moldovan Tourism Product Development

Develop wine tourism destinations. The USAID Competitiveness Project is aiming to support the development of the wine and tourism as a cluster, as such the wine tourism being the main product to be developed and promoted. In Q1 the project initiated several meetings with the representatives from the tourism sector - Tourism Agency of Moldova, TatraBis, Amedeus Travel, Moldova Tur - and wine industry - ONVV, Cricova, Chateau Vartely, Migdal-P, Purcari, Poiana Winery, Asconi and Branesti - to brainstorm and define the two main wine tourism areas to be developed by the Project. Codru and Stefan Voda Wine regions were defined as being the most popular from the tourism point of view and having the biggest potential in developing wine tourism in combination with other tourism attractions. Small wineries in these regions will receive targeted coaching and support to upgrade their tourism products via a range of solutions such as trainings, consultancies, and/or grants. Identification of international consultants in wine tourism product development is in progress.

Develop tourism products and rural accommodation in the main wine tourism areas. The project is supporting the development of tourism products such as: wine tours, rural activities, gastronomic activities, handicrafts. This will help raise the socio-economic development in rural areas and increase the time tourists spend on vacations, as well as reduce the negative effects of seasonality in tourism.

During the reporting period, the project engaged a local consultant, Mrs. Svetlana Lazar to implement the first phase of this activity, which includes conducting an assessment of the current potential of the rural pensions and tourism attractions in the wine regions. About 10 to 15 rural pensions and other 10 to 15 local tourism facilities were identified and assessed in Orheiul Vechi and Cimislia. More than 50 individuals participated in the presentations conducted by the consultant, including those who own a rural pension, or want to start a rural business, artisans, representatives from the local authorities and others. As a result of the assessment, several of these facilities and pensions will be proposed to enroll in the project's coaching and assistance program.

In addition, Natalia Curnic, the project Tourism Industry Manager participated in a familiarization tour in Bosnia and Herzegovina on December 14-17, 2015, organized by USAID/REG (Regional Economic Growth Project). The REG Project works to develop new, innovative high value tourism experiences in the Western Balkans, one of them being Gastronomy and Culinary related activity tours that focus on traditional cooking recipes and techniques and wine production involving local experts. This theme is also valid to Moldova and matches the development objectives of the Project.

As a result of this study tour, will apply her newly gained experience for the development of new rural tourism products focused on preserving the national identity and potentially working towards developing an Ethno Village in Moldova.

Moreover, aiming to learn from the best foreign expertise in rural tourism development, the project decided to organize a study visit to Romania for 7 representatives of Moldovan rural tourism, tourism Agency, rural-pension owners, artisans and other related professionals. The study visit took place during December 16-20 and was organized in collaboration with the National Association of Rural, Eco and Cultural Tourism in Romania (ANTREC Romania) and included visits to two touristic regions of Romania: Piatra Neamt and Buzau region. The participants had the possibility to visit a big number of rural pensions, agro-pensions, some wineries, discuss with rural business owners promotion and marketing tools.



Photo credit: Natalia Curnic

Photo caption: Participation at active culinary tour in Bosnia and Hercegovina, December 14-17, 2015 (from left to right: Natalia Curnic – CP Tourism Industry Manager;



Photo credit: Natalia Curnic

Photo caption: Moldovan participants during the study visit in Romania, December 16-20, 2015 (from left to right: Maria Stoian – ANTREC Romania President; Ecaterina Popescu – Art Rustic Orhei owner, Svetlana Lazar – ANTREC Moldova President; Aliona Cernavca – National Tourism Agency Manager)

Upgrade the concept for the National Wine Day. The National Wine day in Moldova is one of the largest tourism events attracting more than 15 thousand tourists yearly. In order to increase its popularity and grow it to the level of an international event, the project decided to support the development of a new concept along with a development strategy for the next three years. The project held several meetings with participating wineries and event organizers to brainstorm new ideas. Implementation phase will begin in Q2.

Develop Moldovan meetings, incentives, conferences, and events (MICE) tourism products. Aiming to diversify Moldovan tourism offer and seasonality of tourism services, the Project decided to support the development of MICE products. To better understand the specifics of the MICE international market, the project supported a study visit of a group of six Moldovan MICE operators (TatraBis, Amadeus Travel, Solei-Turism, Berlizzo Events, Park Communication and AQA Logistics) to the IBTM Barcelona MICE Fair, one of the most reputed specialized exhibition for MICE business. On November 16-18, 2015, the group participated at different specialized workshops and had pre-arranged meetings with possible partners. The valuable experience gained within IBTM Barcelona is substantial, as the industry needs to define the positioning and unique selling proposition of the Moldovan MICE products and develop its roadmap to the market. Following this visit, the participants held a meeting with the local tourism industry stakeholders and discussed the key learnings and defined the action plan for the following quarter, including the definition of the Moldovan MICE tourism offer. The Project will support the development and implementation of this plan and will contract a consultant to assist Moldovan companies in these endeavors.



Photo credit: Rodica Tataru

Photo caption: Moldovan delegation at IBTM Barcelona, November 16-18, 2015 (from left to right: Emilian Dzugas - Tatra-Bis Director; Lidia Polcanova - Park Communication Manager, Mihaela Bagrii - Amadeus Incoming manager; Herry Fine –MICE Expert, Paul Robson – Editor in Chief of Congress and Events Magazine, Rodica Tataru- AQA Logistics Director)

The project supported the participation of a Moldovan MICE product company, TatraBis, to an important MICE event in Poland - Travel Bidder (B2B event) organized on November 24, 2015. TatraBis is the leading DMC (Destination Management) Company in Moldova. Its director, Mr. Emilian Dzugas, had 16 business meetings and resulted in a request for MICE services for March 2016.



Photo credit: Emilian Dzugas

Photo caption: Participation of TatraBis at the Travel Bidder event organized in Poland on November 24, 2015

Wine attractions and gastronomic activities including corporate and teambuilding programs at Cricova, Et Cetera, and Chateau Vartely wineries, got most attention from the Polish agencies and corporate customers. The direct flight Warsaw – Chisinau – Warsaw with round trip price less than 200 EUR could stimulate the cooperation with Polish MICE agencies. Still, the Polish MICE agencies do not consider Moldova as a MICE destination, as they are not acquainted with Moldovan MICE offer. This is why the project intends to further assist the development of targeted MICE offers and the increased presence on the key target market, such as Poland.

A1.1. Activity 5. Improve Workforce Skills and Education Standards in the Tourism Industry

Assess gaps in tourism education and develop action plan to meet private sector needs. In Wine & Tourism, the skills gap assessment was launched. This is an important activity for the wine and tourism cluster since it faces immediate shortages in skilled workers and management know-how. Most of the industry's workforce was trained using Soviet curricula and is not acquainted with modern practices and technologies. The change of the industry product quality paradigm (from high volumes to higher quality) requires the sector's workforce capacities to adapt to the new needs of the wine business.

The Project launched the skills gap assessment in December 2015, which resulted in the initial desk research, preliminary interviews as well as identification and definition of job roles and professional skills specific to the industry. Magenta Consulting SRL was selected as a subcontractor to carry out the survey for skills gap analysis.

A1. Objective 2: Expanded Market Linkages

A1.2. Activity 1: Build Wine of Moldova Brand Equity and Increase Awareness about Moldovan Wines

Increase Wine of Moldova brand awareness through strategic international PR activities. The Wine of Moldova (WoM) country brand was launched internationally two years ago. Now, the second phase of promoting the country brand needs to begin, with the generic WoM communication tactics. USAID Competitiveness Project has subcontracted a local creative agency to produce the video ad as part of the WoM communication campaign toolkit. The project will support the ONVV in deploying the advertising campaign on an international level. The first campaign is planned for the Polish market in the spring of 2016.

USAID Competitiveness Project supported ONVV in organizing in December 2015 the visit by internationally renowned wine marketing expert– Mr. Robert Joseph. The visit resulted in the decision to hire Mr. Joseph under a consultancy to draft and assist with implementation of a communication and promotion plan for a country brand – “Wine of Moldova. A legend alive”.

Improve Wine of Moldova online presence and social media communication. Given the importance of the Internet, the website

www.wineofmoldova.com needs to be upgraded into a fully operational information portal, with a clear plan for updating content and future development. In addition to the website, a strategy and action plan to maximize social media platforms also is necessary.

USAID Competitiveness Project has supported ONVV in development the Scope of Work (SOW) for the new Wine of Moldova portal. Additionally, a local expert, Andrei Cibotaru, has been contracted by the project to gather information and provide written content for the new website. Mr. Cibotaru will complete his activity in January 2016 and will provide to ONVV a series of texts according to approved website structure.



Figure 1. Print screen of the Forbes Travel web-site. 'Cool wines to try in 2016' recommends 2 wines from Moldova. Source: <http://www.forbes.com/sites/katiebell/2016/01/07/cool-wines-to-try-in-2016/>

Support the adoption and implementation of the Wine of Moldova utilization rules and the international IP legal protection. The WoM country brand was conceived as a quality brand that would be accessible only to those wines that comply with the quality technical specifications. The USAID Competitiveness Project will provide assistance to the ONVV to obtain international intellectual property (IP) protection for the WoM brand and its rules of use. These procedures will be initiated in April 2016 and will be supported by the project. Meanwhile, the project supports the ONVV in completing the Wine of Moldova country brand regulation, which needs to be approved by the Minister of Agriculture and Food Industry and will serve as one of the main documents for the international IP protection under the Paris Convention for the Protection of Industrial Property, of March 20, 1883, as a national quality brand. In this way, the Wine of Moldova brand will benefit of an extensive IP protection in more than one hundred countries, without having to pay high trademark (TM) registration costs.

Develop concept for an international wine competition to be held in Moldova. Specialized wine contests. The current “Chisinau Wine and Spirits Contest,” organized by a local private sector company not representative of the sector, is poorly promoted and has not succeeded in positioning itself as equal to similar international competitions. The organizer of the “Chisinau Wine and Spirits Contest” is not willing to transfer the responsibility for the organization of the contest to the ONVV. Consequently, the ONVV board has decided to develop a new international competition to be held under the Wine of Moldova umbrella. The project will support ONVV to develop the concept of the new wine competition, accordingly to the following objectives: to position the competition as a ‘Black Sea wine competition’, to include an international but also a national dimension, and to organize the contest accordingly to the International Organization of Vine and Wine rules and accreditation. This activity will be started in February 2016, and the new contest is planned to be launched in 2017.

A1.2. Activity 2: Foster Business Linkages and Expand Wine of Moldova Exports

Support generic participation under the Wine of Moldova country brand at wine exhibitions and trade events. The WoM platform is the main marketing program supporting wineries to penetrate new target markets. USAID Competitiveness Project has supported ONVV to continue following the WoM Marketing and Promotion Framework, by participating in international fairs and exhibitions, and organize business-to-business (B2B) and business-to-consumer (B2C) trade events in target markets.

- GoodWine trade fair, Bucharest, Romania – an impactful presence and public awareness. USAID Competitiveness Project has supported ONVV and 17 wineries to coordinate the participation at the GoodWine trade fair in Romania on November 20-22, 2015. The project assisted with funds for a shared booth. The support aimed to enhance the WoM presence through a richer PR presence and communication and to enhance ONVV’s ability to think strategically about the visibility of its trade activities on export markets. With project assistance, two press releases have been issued by a professional PR agency about the participation of Wine of Moldova at the GoodWine trade fair and an insert in organizers’ official press release was added. Additionally, the PR agency has established strategic media partnerships and organized a web-banner campaign. The results of the activity are 18 press releases about the event and banners placed on 21 websites.

Additionally, the project has established a long partnership with Vinul.ro, the most relevant and well-positioned wine magazine in Romania that included the publication of three articles in electronic and paper versions of the magazine, two of which were related to participation of WoM and ASW at the 2016 edition of GoodWine.

As a result, WoM got increased public awareness among wine professionals and wine consumers. Romanian wine bloggers wrote about Moldovan wines and its participation at GoodWine; Moldovan presence being considered the most successful appearance at the trade fair.



The 17 wineries participating at the fair declared an unprecedented interest for Moldovan wines on behalf of the Romanian wine professionals, which may result in increased business partnerships and product listings. As such, Moldovan wine exports in Romania has increased by 150% in 2015, showing the results of the promotion efforts made during the past years.

- **Master classes with Moldovan Author Wines in Bucharest, Romania.** The USAID Competitiveness Project supported the ASW to penetrate the Romanian wine market and to enhance the branding and position of Moldova's most exquisite author wines. Consequently, the project developed a promotion plan around the GoodWine fair, dedicated specially to the small wine producers, aiming to introduce their wines on the Romanian market. Two guided tastings with wines from the small wine producers: one B2B master class and a B2press event, were organized with the Project's support. The project contracted a local PR agency, and a reputed wine expert (Catalin Paduraru) to organize and moderate the tastings.



Photo credit: ASER management & consulting SRL

Photo caption: Ph.D Catalin Paduraru, expert wine taster, conducting the B2B event for ASW during GoodWine 2015. Bucharest, 2015

The B2B tasting event was organized within the business platform of the GoodWine trade fair, whereas over 45 wine professionals and wine journalists participated. The event was fully booked in advance and has made a strong impression among Romanian wine experts. The B2press tasting was organized in Vatra Neamului restaurant, a Moldovan restaurant in Bucharest, with a good reputation among wine & gastronomy experts. The event was attended by 49 wine journalists, bloggers and opinion authorities.

The positive reviews led to increased orders on behalf of the Romanian wine importers. Consequently, EtCetera winery, which has entered Romanian market three months ago, has already got first orders for high quality priced wines. Also, the Carpe Diem winery is discussing a business partnership with a Romanian importer and shall start shipping first wine batches in the first months of 2016. The project will continue to support the ASW marketing & promotion plan implementation in Romania.

Text Box 1. Testimonial on Moldovan wines' quality, GoodWine 2015

"I'm delighted to enlarge my presentation with wines from Association of Small Winemakers from Moldova, they deserve a special attention especially from representatives of wine-shops and HoReCa in Romania. I highly appreciate the quality and the aroma bouquet of these wines, the reason that gives me the right to declare myself its active promoter.

*Ph.D Catalin Paduraru,
Wine Expert,
Founder of National Patronage
of Vine and Wine Romania*

- Preparing Wine of Moldova participation at ProWein 2016 trade fair. The USAID Competiveness Project is determined to enhance the presence of Wine of Moldova at the most important business exhibition for the wine industry, ProWein, held annually in Dusseldorf, Germany. The Project has defined a draft plan for the Wine of

Moldova participation at ProWein, which includes several elements, such as: a strong PR & Communication component; advertisement & on ground visibility; trade activities and animations at the booth; side-trade-events with key business partners; and the organization of a professional participation at the national booth. The Project has initiated an agreement of sponsoring Wine of Moldova participation to ProWein if these above-mentioned components will be implemented by the ONVV.

International wine expert, Robert Joseph, agreed to moderate a specially dedicated master class with Wine of Moldova with wine journalists and opinion leaders within the ProWein trade fair.

Improve the image of Moldovan wines' quality by supporting the participation to international wine contests. One of the instruments to foster business linkages is the participation of the WoM at international wine competitions. In this respect, the Project is supporting Moldovan wineries to enroll their quality wines into the internationally renowned wine competitions. A list of most relevant wine competitions was developed along with draft attendance budgets. Additionally, the project has decided to support the participation of the small wine producers to the Berliner Wine Trophy competition in February 2016.

A1.2. Activity 3: Implement an Export Coaching Program (ECP)

Support new generation wineries to develop market penetration strategies. The ECP is oriented at supporting and coaching new wine exporters to enlarge their presence on EU markets. The Project conducted interviews with new generation wineries to assess their sales & marketing plans, which resulted in the ECP concept note agreed with the ONVV. Registration will start in January 2016 at which stage wineries will be able to express their interest in participation in the ECP based on their level of penetration of the specific market. The main markets selected by the project to be supported within the ECP are Romania, Poland, and Czech Republic.

Deploy ECP support and coaching the development of new export markets. The USAID Competitiveness project is supporting ASW in developing a common marketing vision, communication and promotion plans for target markets. A local marketing expert, Mr. Vitalie Panuta, will support ASW in conceiving a common marketing vision, define USPs and establish key target markets. In addition, the consultant will provide coaching services for individual ASW members in developing their own promotional and marketing plans.

Additionally, the Project supported content updates to ASW web-site, www.winemoldova.com. Additionally, the project agreed to support the ASW in developing a marketing materials toolkit (POSM) which is needed for their promotional activities.

ASW members are already selling wine to a German importer and are keen at increasing their sales on the German and Austrian market. As such, the Project will finance the participation of the ASW members at the Wein Messe Berlin trade fair that will take place in February 2016.

Assist Moldovan wine exporters to generate more sales on the EU markets. Aimed at companies that already established presence on the EU market, the project has met with ONVV to generate an implementation vision for 2016. The project will determine the marketing strategies of the wine exporters and decide about aligning its support to those promotion activities that are consistent with the Wine of Moldova marketing plan for 2016.

Support the development of new wine products adapted to export markets. As part of the ECP assistance, the Project will provide assistance to adapt the profiles of wine products

to the requirements and specifics of the export markets. This may include: developing specific product segments, branding, wine labels, etc. This activity will begin starting with March 2016.

A1.2. Activity 4: Develop Domestic Wine Market and Enhance Wine Culture

Perform market research. To better position Moldovan wines domestically, the Project identified the need to conduct a market research that would allow wineries to develop strategic goals for the local market. Following an open competition process, a local research agency has been contracted (Magenta Consulting), which has initiated the first phase of gathering market intelligence data from secondary sources: BNS, MAFI, Customs etc. The collection of data will take place in January 2016 based on a pre-approved questionnaire, whereas the cumulated report will be available in the beginning of February 2016.

Promote wine culture and upgrade the quality of the wine services in local hospitality facilities. In order to build a wine culture, raise awareness about domestic wines and increase consumption, the project in collaboration with ONVV developed and implemented the first wave of “Wine Friendly Restaurant” (WFR) program. Within this wave, 12 local restaurants were accredited based on a specific set of criteria (‘cahier de charge’) and participation in all the Wine Friendly activities organized by the project.

The WFR program was implemented during December 8-22, 2015 and has included the following components: 5 sommelier trainings for the restaurant’s staff; 17 master classes for restaurant clients on the wine culture hosted by 7 sommeliers and 17 bloggers that gathered more than 650 guests that tasted over 360 bottles of wine from 12 participating wineries. A set of POSM materials including wine serving guides restaurant staff; a PR & communication campaign on the wine & restaurant people including: a dedicated facebook tab, 17 promoted facebook events each with own dedicated posts about wines and hosts, as well as dedicated photo galleries.



Photo credit: Anna Dubeli, Locals.md

Photo caption: tasting event held at Buffalo restaurant on December Dec 10, 2015 (from left to right: Andrei Cibotaru, wine blogger (www.finewine.md) and Ion Luca, a small wine producer of Carpe Diem wines and owner of Carpe Diem wine shop, acting as hosts for guided event)

The WFR activities have generated awareness and benefited from increased interest from wine consumers, restaurants, and wine producers. Additionally, the campaigns contributed at increasing awareness of the Wine Vernissage event, which was held as the closing event of the WFR campaign. A number of



Photo credit: Anna Dubeli, Locals.md
Photo caption: setting before the tasting event with full set of POSM materials, Buffalo Steak House, December 10, 2015

restaurants have already contacted ONVV expressing their interest in participating in this program. Consequently, the project decided to plan the second phase of the WFR program for February 8-22, 2016.

In partnership with a local news portal, the project has produced a set of 7 videos meant to promote the wine & food pairing and wine friendly restaurant program that gathered over 750,000 views. These videos will be used during the following WFR program campaigns and will be complemented with additional series of videos.



Photo credit: Maxim Chumash
Photo caption: Natalia Morari, Owner of Propaganda restaurant and Alexandru Luchianov, winemaker and co-owner of EtCetera winery, participating in foto session supporting the WFR PR campaign, December, 2015

Increase awareness about wines and boost domestic sales. The Project joined efforts with ONVV and Association of Wine Producers and Exporters (APEVM) in organizing the 9th edition of the Wine Vernissage, one of the most visible wine events of the year, organized on December 21st at the Palace of the Republic. A total of 36 Moldovan wineries, including 10 small wine producers, have showcased about 200 quality wines.

The project has contributed to the development of the organizational framework for the event and supported with the PR & communication campaigns. About 1,000 wine lovers attended the event, which has been extensively promoted in the local press and social media. During the event, the wine shop specially set up specifically for the event, registered an impressive 100% increase in sales.



Photo credit: ONVV

Photo caption: Sorin Maslo, Cricova Marketing Manager receiving the special prize of the 9th Wine Vernissage Edition from Dumitru Munteanu, Director of the National Office for Vine and Wine December, 2015

One of the communication innovations was related to the engagement of retail outlets such as Linella and Unimarket. The Project placed POSM on wine SKUs registered at Wine Vernissage in 15 of the most important stores in the Chisinau area that feature large, dedicated wine sections.

This activity incentivized consumers to purchase high quality local wines and to attend the Wine Vernissage. Paired with the holiday season, Wine Vernissage tickets sales increased by 20%.



Photo credit: Promomedia
 Photo caption: Neckhangers placed in retail outlets, the slogan says: "Taste me at the Wine Vernissage" December, 2015

A1.2. Activity 5: Foster Business Linkages and Increase Demand for Moldovan Tourism Products on Target Markets

Support participation at international trade fairs and targeted trade missions.

Participation at international trade fairs and targeted trade missions are keys to fostering business partnerships for the Moldovan tourism industry. Based on discussions with the tourism stakeholders, a preliminary promotion plan for 2016 has been defined. According to this plan, the Vakantiebeurs exhibition in Netherlands in January 12-17, 2016, is one of the biggest specialized events in the world. It will be the second time when the Moldovan tourism companies will participate at this event, and the USAID competitiveness project will provide them support in participating under the tourism country brand. The stand was reserved and the participating companies were identified. As the main product to be promoted at this event is wine tourism, along with the tourism companies TatraBis and Amadeus Travel, Cricova Winery and Castel MIMI will have the possibility to present their offers to the international market and meet new customers under the TCB" Tree of Life". Moreover, in order to make our participation at the exhibition more visible, two presentations with wine tastings will take place at Moldova's stand: for mass media and partners. During the reporting period all the organizational aspects of this activity have been undertaken including stand design, promotional materials development, mass-media registered at the exhibition and business partners were informed and invited to participate at the presentation and wine tastings. Aiming to achieve sustainability in organizing such trade events, the project decided to involve ANTRIM in the organization of this activity, planning that the association will get more expertise in this area and take over this type of activity from the project.

Moreover, as the organization of the dedicated familiarization tours for potential partners proved to be a very efficient way of business expenditure and new markets penetration, as in the CEED II, the project decided to continue this activity. The program will start in January of 2016.

Develop the domestic tourism market. As internal tourism remains a big issue, as demand is increasing, to increase interest towards the tourism attractions in Moldova, the project has conceptualized a program in 2016 that involves supporting series of tourism events. This will be directed mostly for the promotion. The program will be open for application in January 2016.

A1.2. Activity 6: Increased International Awareness about Moldova as a Tourism Destination

Develop PR and communication campaign. The project considers it important to support the development of a generic communication strategy for the Tourism Country Brand (TCN). Though the TCN has been launched over one year ago, its perception of the international and domestic market is not brand driven, but rather driven by opportunistic activities. To build a stronger generic platform that would support the promotion of Moldovan tourism products, the project has engaged Mr. Boico to provide support to the National Tourism Agency (NTA) and ANTRIM. He will help them develop a generic communication strategy for the TCN and formulated TCB campaign concepts which will be linked to the country tourism and marketing plan 2016-2017. This should be developed by the end of February 2016.

Enhanced online presence on the Moldovan tourism destinations and products. The existing www.moldova.travel website and Moldova Holiday smart phone app need improvement, including engine optimization, content improvement, and the ability to use them to purchase tourism services. The project will support ANTRIM and the NTA to design a well-defined vision for communication via social media and increase visibility on international travel platforms such as Expedia and TripAdvisor, in addition to providing communications and website development support from consultants or communications firms. During the reporting period the project conceptualized this activity and discussed with ANTRIM and NTA the possibilities of offering the association a grant for the implementation of these actions.

A1.2. Activity 7: Embedding ICT Solutions in Tourism Industry

Increase adoption of ICT by hospitality industry. This activity will start in June of 2016.

A3. Objective 3: Improved Sector-Enabling Environment and Increased Capacity

A1.3. Activity 1: Support the Continuation of Policy Upgrading and Legal Regulatory Reforms in the Wine Industry

Implement the new technical regulations on wine products. The project will assist the MAFI, ONVV, and private sector associations by ensuring the initiated legal regulatory reforms are enforced. The project will not only help these organizations implement the new technical regulations into subordinated normative acts, but monitor these new regulations for local implementers via local consultants.

During the reporting period, the ONVV successfully promoted throughout the MAFI two important normative documents that were developed with USAID support, since June 2015 :

- The Regulation on the organoleptic assessment of the wine quality – approved by the Government decision no.810 of October 29, 2015;
- The Regulation on the State Vine and Wine Registry – submitted for approval to the Government of Republic of Moldova in November 2015.
- The forms for the evidence of the PGI/PDO wine production – submitted to MAFI for approval in December 2015.

Additional legal and normative acts need to be developed in order to fully implement the legal regulatory reform, promoted with USAID support, throughout the Vine and Wine Law (no.57/2006 amended by the Law 262/2012) and the Technical Regulation on the organization of the wine sector (no.365/20015). Still, due to political uncertainties this activity wasn't yet initiated, being planned for enactment in January-February 2016.

Disseminate legal regulations and train private sector. Given that the wine legislation was largely modified during the last years, the project will help the ONVV develop legal guidelines for the wine industry and to organize trainings for the private sector on current wine regulations. This activity is planned start in March 2016.

Support the development of a new wine sector strategy. Over the last four years the wine industry has extensively implemented the 2010 white paper "Rethink Wine Industry," and a sector-wide opinion has been formed regarding the future of the industry. To secure and streamline the industry's sustainable development, the wine sector needs to develop a comprehensive wine industry development strategy for the next 20 years. USAID Competitiveness Project will provide support to MAFI, ONVV and private sector to develop a sectorial strategy by using best international expertise and managing a participatory consultation process, beginning in mid-2016.

A1.3. Activity 2: Reform the Wine Industry Official Controls and Product Conformity Procedures

Upgrade the legal framework related to official controls in the wine sector. The official controls in the wine industry are redundant, repressive, and inefficient. Without effective controls over wine products, the industry will continue to struggle with counterfeited wines, which damage the image of the Moldovan wines, affect public food safety, and preserve the unfair competition in the wine industry. The existing State Inspectorate for Controls over the Wine and Alcoholic Products (ISSPA) is not fulfilling its mandate for a variety of reasons, including poor legal regulation. The USAID Competitiveness Project will assist MAFI in reforming the legal framework related to official controls and the product conformity assessment in the wine industry. Foreign and local consultants will develop a concept for a functional ISSPA, as well as legislative modifications. The activity is planned to start in April-May 2016.

Improve ISSPA staff capacities and skills. The project will work with MAFI and ISSPA to identify areas of improvement for inspector skills and capacity. Study visits to Romania and Austria and trainings on the controlling and supervising wine industry activity are planned and will begin in mid-2016.

Provide ISSPA with necessary equipment and resources for the wine industry controls. Once the legislative modifications are completed and enacted, and staff are sufficiently trained, the USAID Competitiveness Project will determine which equipment are necessary for the ISSPA, and provide support to purchase it. The project also will establish partnerships with laboratories so that the ISSPA can do the tests and establish wine products' compliance with the legal standards. The activity is planned to start in Quarter 3 of 2016.

A1.3. Activity 3: Support Access to Finance for Growth and Start-Ups in Wine and Tourism Industries

Support SMEs to qualify for donor financing opportunities. The USAID Competitiveness Project shall offer support to the wineries and tourism facilities to access finance through special channels, such as the EIB credit line "Filiera Vinunlui" and other available financing opportunities. Small and medium-sized winemakers have difficulty accessing these

resources because of administrative requirements, including the prerequisite to prepare a professional business plan. The project will offer support in this regard, providing local consultancy for the development of business plans and feasibility studies.

The project will also assess the format of its support for the access to finance, taking into consideration the difficult situation of the finance sector of Moldova (increased credit rates, unstable economic indicators, fluctuant currency exchange rate, etc.) and the fact that only four banks are currently working with the EIB Filiere du Vin credit line, which means interest for the EIB credits has decreased.

A1.3. Activity 4: Upgrade Tourism Sector Policies and Reform Regulatory Framework

Support the adoption and implementation of the “Tree of Life” utilization rules and the international IP legal protection. In order to ensure a high level usage of the TCB, the project is assisting the NTA in approving the rules on use on the “Tree of Life” brand, and provide assistance in obtaining the appropriate IP protection internationally. As such, during the reporting period the project offered support in the registration at the State Agency on Intellectual Property of the Republic of Moldova (AGEPI), the specialized governmental body invested with the right to afford protection of intellectual property objects, of the Romanian and Russian slogans.

Legal regulatory improvements of the tourism normative framework. As the tourism industry is a multidimensional industry with a wide range of sectorial associations including ANTRIM, the National Rural, Ecological and Cultural Association (ANTREC), and the National Tourism Development Association (ADTM), the NTA has a Consultative Consul representing the private sector and discussing with it the main issues to be addressed by the Government in this field. During the reporting period, Natalia Turcanu, ANTRIM’s Executive Director, was elected President of this council. This is a great step in contributing to the industry’s development at all levels, while promoting the project’s vision.

A1.3. Activity 5: Strengthen the Role of the ONVV as the Main Professional Organization of the Wine Industry

Support the development of the ONVV’s institutional capacity. The USAID Competitiveness project supports the ONVV’s ability to respond to the expectations of its stakeholders. In order to improve communications between the ONVV and its counterparts, following the ONVV institutional communication strategy, the project contracted local consultant, Mrs. Marina Gospodarenco in November 2015. To date, Mrs. Gospodarenco assisted the ONVV in assessing the gaps and inefficiencies of the staff and internal procedures, as well as developed guidelines, recommendations and business processes to enhance the ONVV communication potential.

Mrs. Gospodarenco helped develop a specialized newsletters’ service, which released its first newsletter in December 2015. Additionally, Mrs. Gospodarenco upgraded the institutional communication tools, such as: presentations, institutional briefers, press releases templates, etc. One ONVV employee is coached and mentored daily in performing these services and will take over duties once assistance is complete.

Assist the ONVV in developing and providing marketing and business intelligence services to the wine industry. The project has contracted a local expert, Mr. Stanislav Madan, to support the ONVV with business intelligence services, which is meant to become a new ONVV product for its stakeholders. The consultant has developed reports and

resumes that will be shared with the wine industry and will be used by the ONVV in strategically planning its activities. In December 2015, the consultant provided an analytical report on domestic market; market sheets for five key markets based on Euromonitor data; and general overviews of wine press. In January 2016 these reports will be distributed to wine sector stakeholders and used in adapting wine industry marketing strategies to market realities.

Assist the ONVV in providing marketing and sales trainings to the wine industry. The project will help the ONVV develop and organize trainings and workshops on marketing, sales, management, and other related topics for wine industry personnel. This training module will be integrated into the WoM Academy curriculum, along with technical modules. The USAID Competitiveness Project will provide the ONVV with local and foreign consultants to develop the curriculum and put together an implementation schedule for these training programs. In addition, the project will integrate the delivery of these trainings and/or workshops into the scopes of work for future international consultants to Moldova under this project. During the reporting period, no international consultants for this activity were brought to Moldova, but the activity will be resumed in Q1 2016.

Support the development and strengthening of PGI wine associations. In order to enforce the PGI wine production system, the PGI associations need to be fully operational and execute their legal and statutory role.

In December 2015, the ONVV organized regional wine tastings with candidates for PGI certification. During these tastings, 380 wines from 55 wine producers were assessed. The results of this assessment will inform subsequent measures to increase the quality and activity of PGI associations, as well as to improve the organizational structure of certification procedures. This activity was necessary because it helped inform the USAID project and the ONVV on the average level of quality of wines proposed to PGI nomination, which will help them decide on what type of support needs to be deployed to address quality issues and controlling procedures.

The PGI wine associations need support organizing their internal controlling procedures and developing services for their members. The project, together with the ONVV, will provide support to the PGI wine associations by offering local and international expertise and access to project's grants. This activity will start in April 2016.

A1.3. Activity 6: Strengthen ANTRIM's Role in the Tourism Sector

Strengthen ANTRIM's institutional capacity. The USAID Competitiveness Project will help ANTRIM with its sustainable operational and financial management in order to raise its status as a professional tourism organization within the tourism sector. In this regard, the project shall provide assistance in developing new services to ANTRIM's members, such as business and marketing intelligence services, lobby and generic marketing mandate.

A2. LIGHT INDUSTRY

A2. Objective 1: Increased Productivity and Quality (Better Workforce and Adopted Innovation)

A2.1. Activity 1: Develop the ZIPhouse Accelerator and Raise Skills Through Education

Enhance ZIPhouse capacity. ZIPhouse was created to address the key challenges in workforce development, education, and academia's collaboration with the private sector in the light industry. This activity aims to develop ZIPhouse capacity to become a platform for creativity, design, technology, and workforce development. This activity is led by Innovation and Business Development Specialist Tatiana Durllestan.



Photo credit: ZIPhouse

Photo caption: ZIPhouse students working in the ZIPhouse production area, benefiting of sewing special machines

During the first quarter of its activity, the USAID Competitiveness Project worked with ZIPhouse and APIUS management teams, exchanging visions on the strategic and sustainable development of the Center; identifying and addressing the main operational and institutional constraints faced by the Center; and drafting educational and community content.

The USAID Competitiveness Project will strengthen the Center's institutional capacity and support the development and the implementation of policy and operations manuals, guidelines, and job descriptions for the main ZIPhouse areas.

The policies and guidelines will provide ZIPhouse management with a framework for action for its personnel, as well as facilitate cooperation between the Technical University of Moldova (TUM), APIUS, and the Board of Mentors. Local consultant Olga Popa was contracted to work with ZIPhouse management team on the development and implementation of policy and operations manuals guidelines, and job descriptions for the main areas such as acceleration, mentorship, textile and electronic library, community building, organization of production area, etc. The assignment has been split in two phases. The first phase, “Development of policies and guidelines,” took place on November 20, 2015 – January 15, 2016 while the second phase, “Implementation,” si schedule for January 15, 2016 – February 19, 2016. The consultant, together with ZIPhouse management team, already developed and started implementing two guidelines: Ziphouse Communication & Event organization, and ZIPhouse Access & Pricing. These two guidelines allowed the Center to be operational, which included providing access cards to its beneficiaries and organizing trainings, workshops and community events.

Text Box 2. ZIPhouse Results during October-December 2015

- 4 Training of Trainers for TUM and ZIPhouse staff on using the ZIPhouse software and equipment, provided by the suppliers, to 19 beneficiaries
- 4 training and working sessions, engaging about 20 volunteers into the development of the textile library (peoples, students, fashion amateurs, young designers) with APIUS support
- 3 courses on using special soft wear like Adobe Illustrator, Gemini CAD in fashion industry (108 hours in total) for 36 students in total
- 1 course on “Knitting machine training” for 12 students
- 5 community building events with more than 330 participants
- Hosting for 4 events organized by other parties
- 34 access cards sold,
- more than 400 participants,
- 37,000 MDL earnings.

The USAID Competitiveness Project also organized a study and experience-exchange trip for ZIPhouse and project technical teams with similar accelerators or excellence centers, in order to exchange best practices and establish linkages for future collaborations. One such trip was to Estonia in November 30, 2015 – December 3, 2015, during which Moldovan participants visited the Tartu Center for creative industries, Tallinn Creative Incubator, Estonian Design Center, Estonian Design House, Innovation and Business Center MEKTORY, University of Applied Sciences, Faculty of Clothing and Textile, Technopol Science Park, Estonian Designers Association, Wise Guys Accelerator. During this trip, the Moldovan delegation members learned how the Estonian ecosystem was built; how linkages and support works between the players of the ecosystem; what facilities and the endowment of the visited centers look like; and how to ensure sustainable development of the centers. The Moldovan delegation members also learned directly from the visited centers’ representatives, including managers and management team, details of their missions and objectives, organizational and financial mechanisms, type of programs and activities developed, and community building strategies. A direct result of the study exchange is that ZIPhouse staff has started introducing lessons learned in their plan of activities, and the project team has started developing the concept for a Design Thinking Lab to be created within TUM as a part of the “education excellence hub” in connection with ZIPhouse and Tekwill.

The USAID Competitiveness Project intends that the ZIPhouse will grow into a national industry platform for creativity, design, engineering, and technological skills, with a strong fashion community around it. However, in order to build the community, ZIPhouse needs a strong own-branded identity and efficient communications channels, such as newsletters, social media accounts, and websites to reach partners and beneficiaries. Such communications channels will ensure a greater impact on the workforce as a primordial scope; increase the number of potential beneficiaries; gain the loyalty of its members and partners; disseminate Center knowledge to a wider audience. The Project subcontracted Creatego to provide consultancy and implementation services on digital marketing for ZIPhouse. The assignment started in November 2015 and will be finalized by March of 2016.

Strengthen ZIPhouse educational content. The USAID Competitiveness Project aims to enrich the education of the light industry's key players. To do this, the Project subcontracted international expert, Mr. Francesco Veneziano, to establish collaborations between formal professional education programs at foreign institutions with TUM. Mr. Veneziano has a background in teaching and entrepreneurship related to Fashion Marketing, Management and Design Psychology. He also has international experience in establishing educational collaborations and developing joint degree and exchange programs in Europe and Asia.

In December 2015, Mr. Veneziano came to Moldova to better understand the light industry and its needs as it relates to the workforce, educational gap, existing curricula, and expectations of potential beneficiaries. He had separate meetings with focus groups composed of students, the private sector, professionals, and academia. As a result of these meetings, Mr. Veneziano drafted recommendations on potential types of collaborations, from which an action plan was developed that included preliminary steps for signing a memo of collaboration with Italian universities.

As a result of Mr. Veneziano's research on potential collaborations, Mr. Veneziano will recommend the optimal quick-win solution and develop a detailed joint education program concept. The expert will also assist TUM's management during the arrangements for signing the contact with the selected institution and will join the TUM's management at the negotiation and pre-signing visit to the selected foreign institution. Mr. Veneziano's assignment is December 2015 - March 2016.

Boost creativity, entrepreneurship, and community building. The project organized an event during Global Entrepreneurship Week, entitled, "Inspiring Women in Fashion Business". This event, which took place on November 19, 2015, was organized by ZIPhouse Design & Technology Excellence Center, in cooperation with the Light Industry Manufacturers Association (APIUS).

The "Inspiring Women in Fashion Business" event celebrated Women in Business International Day, and inspired and encouraged women in the fashion industry to create startups and to path a career in the fashion world. During the event, five successful women in the fashion business – women who developed their own brands, Raquette, Crème Brule, Ponti, Irka Shows and Lia Fia – gave inspirational talks to an audience of approximately 90 participants, including students, young designers, other women from fashion business, and fashion bloggers. These women also gave interviews for a video on successful women from the light industry, which the project helped develop, to be later used in "Career in Light Industry" promotional campaigns.

Julie Stufft, the Deputy of Chief of U.S. Embassy Chisinau, gave remarks at this event, highlighting the U.S. government's support for the advancement of Moldova's light industry, and encouraging women to strive for a career in it.

The "Inspiring Women in Fashion Business" event also awarded certain successful women with Certificates of Recognition for their valuable contribution to entrepreneurship development in Moldova's fashion industry.



Photo credit: Allmoldova

Photo caption: Certificates of Recognition awarding: Oxanda Lungu, Lia Fia brand owner (on the left), Julie Stufft, DCM US Embassy Moldova (on the right)

In December 2015, the ZipHouse, with project support, premiered “Fashion Cappuccino,” the first of a series of community-building and knowledge-sharing events. Jullia Allert, a well-known clothes designer, was the kick-off speaker of the Cappuccino series, addressing an audience of more than 50 students and young designers on her success story. Fashion Cappuccino will be organized jointly by ZIPhouse and APIUS, once every three weeks.

Define ways to improve education in professional schools. During the reporting period, the project launched a skills gap assessment of the light industry, in order identify ways to improve education in professional schools so that graduates possess the skills employers need.

The skills gap assessment included desk research; preliminary interviews; and focus groups activities with industry representatives and the project’s subcontractor JAA. There assessment will eventually include a survey component, which will be carried out by local subcontractor, Magenta Consulting. To date, the project has formulated a list of questions that should be addressed during the survey; defined preliminary job roles and professional skills specific for the light industry, determined the size of sample and selection of sample, and have some methodological direction for survey performance. The project was also able to develop terms of reference for the survey on selected sample of companies.

A2.1. Activity 2: Streamline Manufacturing Processes

Implement innovative methods for workplace organization. The USAID Competitiveness Project aims to increase productivity of apparel companies through the implementation of innovative methods for workplace organization and production line organization, as well as investments in new technologies. This activity was designed for large companies that provide services for foreign clients, as well as in small- and medium-sized enterprises and newly created companies which started to produce under their own label.

In general, low productivity is often caused by poor work organization. The project addressed this problem by sending a local consultant to five own brand companies – including three apparel companies (Vistline Ltd, Olga Ceban IC, Zivax Maxi Ltd), one footwear company (Oldcom Ltd), and one accessories company (Bit Program) – to use an analytical method of measuring work time, called “the photography of the working day.” The local consultant used this analytical tool in each manufacturing company, the local

consultant accurately calculated time losses, and developed a measurement plan to eliminate future losses.

Based on processing the data from the “work day photography” the local consultant made the following conclusions:

- In Bit Program Company, 89-94% of the working time has been used to perform the basic work. To increase production efficiency, it should increase the intensity of the use of working time.
- In Oldcom Company, 88-90% of the working time has used to perform basic operations, 3.5-5 % to perform auxiliary operations. Loss of working time constitutes 5-7%. To increase the intensity of labor, there should be introduced more rational methods of work and training for seamstresses. This will be done by careful analysis of each operation and design methods for its implementation.
- In Olga Ceban Apparel Company, working time at the sewing machine is 89-92%, auxiliary operations take 3-7%, and direct loss of working time constitutes 3-6%. The main way to increase production efficiency is to increase the intensity of working time. To do this, the consultant recommended implementing a system for assessing the effectiveness of the use of time, and rational organization of work processes.
- In Zivax Maxi Company, the share of direct working time at the sewing machine is 91-95%, auxiliary operations take 2-6%, and direct loss of working time constitutes 0.5-2%. To improve efficiency it is necessary to increase the intensity of labor through the introduction of improved production and training seamstresses.
- In Vistline Company, the share of direct working time by a seamstress at a sewing machine is 64.4%, ironing constitutes 17.64%, auxiliary operations take 11.29%, and direct loss of working time constitutes 3.97%. The company is inefficiently using working time of qualified professionals. If they release their seamstresses from ironing operations and eliminate direct loss of time, productivity can be increased by 27.59%.

The consultant also proposed production organization improvements, which will lead to productivity enhancement. The consultant is now assisting companies in implementation of the recommended measures for productivity enhancement.

One of the most effective methods to increase productivity in large and medium size apparel companies is learning best practices. To help Moldovan apparel companies to learn best practices in production organization from a successful European textile manufacturer and to understand the benefits of investing in it, on November 25, 2015 the Project organized one study visit for a delegation of directors and/or production managers from 11 Moldovan apparel companies to the SORSTE Apparel Company in Romania. The objective was to observe and learn from good practices in production organization. The participating companies - Tricon, Ionel, Mobile, Portavita, Artizana, Odema, Maicom, Canindsport, Ecotextil Grup, Premiera Dona, Saltoianca, are large and medium-sized Moldovan companies that provide mostly services for foreign clients.

Text Box 3. Testimonial on the organized study visit on Production planning in Sorste apparel company from Romania

“I was very impressed by the planning of launching in the production of new orders. This model enables smooth transitions from one order to another without interrupting the operator’s work. This ensures permanent high level of labor productivity. Technical assistance is needed to implement the planning model in Ecotextil Grup LTD as well as in other Moldovan apparel companies.”

*Luminita Corcimari
Production Specialist of Ecotextil Grup
Apparel Company*

During the visit, SORSTE Company's production specialist shared their experience in production organization, explaining and showing how the workplace and work flows are organized. Moldovan specialists observed the implementation of innovations and their influence on the product quality and productivity. Moreover, participants learned how the company motivates employees to work efficiently, and about the company's investments in innovations and workforce development. Moldovan specialists also had an opportunity to learn how SORSTE Company makes the planning of launching in production new orders, which ensures permanent high level of labor productivity. The director of SORSTE Company also discussed how to work with foreign clients.



Photo credit: Maria Gheorghita

Photo caption: The production flows of SORSTE Company visited by Moldovan apparel companies during the study tour in Romania on November 25, 2015.

After returning home, some companies started introducing lessons learned. For example, Ionel Apparel Company implemented a similar workflow in its jacket sewing department as the SORSTE Company's, which includes specialization of seamstresses by parts of the jackets, leading to operators' productivity increase of 3-5%.

Assist companies to implement innovative technological solutions. In addition to implementing efficient workplace organization, companies can increase labor productivity by providing employees better equipment and technology to more efficiently complete tasks and enhance product quality. As such, Project Light Industry team, Maria Gheorghita and Tatiana Durllesteanu, together with the Project's Organizational Development Specialist/SEED Fund Manager Diana Grigoriev identified the main areas of assistance in implementing innovations.

Create brands and products in line with fashion trends. Exceptional product design which is regularly updated is critical to the success of apparel companies that produce and sell their own products. Designers must understand how to discern or learn about trends and

how to use the information to develop collections. They must also understand the timing of the fashion industry; when to develop and produce their collection to be in time for the season and to correspond to the requirements of the client from the niche to which they are oriented, both in local and international markets. Unfortunately, many Moldovan companies lack these skills.

To address this weakness, the USAID Competitiveness Project identified an international consultant from Bhavana World Project who will assist five apparel companies (Tricon, Mobile, Allert&Co, Natalia Melnic, and Raquette) which currently design and manufacture their own lines of women's clothing, to evaluate and update their designs and develop a complete women's collection for the Autumn/Winter 2016/2017 season. While the consultant's work will focus on the referenced season, it will also cover general topics such as developing a corporate design/collection policy and execution plan (i.e. defining what products should comprise a collection, advising on how often and when collections should be updated/developed, recommending who from within the companies' design teams should be responsible for what tasks, and suggesting sources of design ideas and inspiration, as well as provide additional source of raw materials and accessories). The consultant will work with the companies through a combination of in-country engagements and follow-up via email and conference calls to discuss progress and provide additional coaching

A2. Objective 2: Expanded Market Linkages

A2.2. Activity 1. Reposition Moldova as a Full Product Manufacturing Partner and Support Internationalization of Moldovan Fashion Brands on Regional Markets

Assist companies to participate in international exhibitions. Participation in international exhibitions is one of the most effective ways to showcase the Moldovan light industry and attract new clients. Based on the impressive impact of the umbrella brand Din Inima on the local market, the USAID Competitiveness Project decided to take the concept to international markets. Participation under a joint Moldovan brand will raise the light industry's international profile and help move towards higher value-added production. It will also allow more companies to attend international exhibitions at lower costs. The logo for international markets has been developed and is being used at international trade shows.

The CIS market is of strategic interest to Moldovan apparel companies that produce and sell under their own labels because of the size of the market. Several apparel companies have started to penetrate the CIS market. Participation in the exhibition is one of the most effective ways to promote Moldovan products on this market. To that end, the Federal Trade Fair for Apparel & Textile "TEXTILLEGPROM" is the largest specialized fair in Russia and the CIS States by number of visitors. The Fair has become a mean of attracting new partners - both customers and suppliers- and serves as the basis of domestic market of the consumer goods industry. More than 50,000 visitors attend the fair each year.

CEED II supported the participation of several apparel companies at the different editions of the fair. As a follow up of this participation, each company got attractive contacts that led to extra sales. This fact proves the importance of continuing participation of Moldovan companies in it. Based on that, USAID Competitiveness Project decided to support participation of 7 apparel companies - Odema, Infinytextil (Draik &Co), Steaua Reds, Ionel, Saltoianca, Portavita and Intercentre Lux, at this exhibition under a Moldovan brand based on cost sharing. USAID Competitiveness Project light industry team worked together with APIUS and selected participating companies, negotiated with trade show organizers and facilitated participation in exhibition planning. On February 16-19, 2016, the companies will participate at Federal Trade Fair for Apparel & Textile "TEXTILLEGPROM".

Participation at the international exhibition Premier Vision Manufacturing is a great opportunity for Moldovan apparel companies. This exhibition provides services for foreign clients, since it is a subcontracting sourcing fair, and it has been visited by a large number of potential clients. Premier Vision Manufacturing sourcing exhibition takes place at the same time and in the same area as the fabric fair Premiere Vision. All visitors (around 50,000 persons) that visit Premier Vision usually also visit Premier Vision Manufacturing. The majority of Premier Vision Manufacturing visitors are in fact purchasing decision-makers and senior managers, production and purchasing managers, and wholesalers.

A group of apparel companies, which provide services to foreign clients, participated at different editions of the exhibition. As a follow-up to this participation, each company got attractive contacts that led to extra sales. This proves the importance of continuing participation of Moldovan companies in it. Based on these results, the USAID Competitiveness Project started to assist four apparel companies – Ionel, Odema, Steaua Reds and Portavita – to continue to participate at Premier Vision Manufacturing exhibition under a Moldovan stand. For this purpose, the project negotiated with the organizer of the exhibition for space for the Moldovan stand and started the preparation of companies for participation at the exhibition on February 16-18, 2016.

The USAID Competitiveness Project has been addressed by two own brand evening wear companies that have specific needs to the type of the product (evening wear and bridal) and the clients' segment. The project decided to support EHO by Evghenii Hodorojcov and Nikita Rinadi by Diana Gudumac to participate at Red Carpet International Fashion Trade Show for Eveningwear in Dusseldorf, Germany in January, 2016. For this purpose, the project negotiated with the organizer of the exhibition the space for the Moldovan stand and started the preparation of companies for participation at the show.

The USAID Competitiveness Project identified own-brand footwear companies that have capacities to export, already participated in international expositions or are export-oriented companies, but still lack the knowledge and skills. Continuing the interventions of the CEED II Project, the current USAID Competitiveness Project decided to support a total of 10 footwear and leather accessories companies to participate at two footwear and accessories trade shows: Leather & Shoes international fair, Kiev, Ukraine in January 2016 and the GDS international specialized fair in Dusseldorf, Germany in February 2016, by co-financing the costs related to expo area and stand construction. The shoes manufacturers that will participate at Leather & Shoes are Oldcom, Cristina, Floare, Tighina and accessories producer – Bitprogram and Maalex. The shoes manufacturers that will participate at the GDS are Oldcom, Cristina, Tiras, Hincu, Floare, Tighina, Zorile, Batistrada and accessories producer - Bitprogram. The USAID Competitiveness Project decided to support the participation of footwear and leather accessories companies at GDS fair under the Din Inima umbrella brand, for which it developed a branded stand design.



Figure 4. GDS Shoes & Accessories fair stand design, using the Din Inima umbrella brand for external market.

Mr. Jordan Saliman, an international expert who has also worked under CEED II, has been contracted again to improve the companies' ability to prepare for participation at GDS, and also to expand their sales by matchmaking Moldovan footwear producers with buyers and other potential clients who could be interested in cooperation. During his assignment in Moldova in December 14-18, 2015 Mr. Jordan Saliman consulted with nine companies in samples selections, and provided individual tips and recommendations for a successful exhibit. The consultant also provided an assessment of a new company, Trenwood, to estimate its development potential. The consultant will continue his assignment in his home country, the United States, and will also assist the companies at the GDS expo to provide assistance to manufacturers during the discussions and negotiations with potential buyers. This intervention is due to the fact that previous participations at GDS resulted with attractive contacts that already led to extra orders from Poland and Russian buyers.

The USAID Competitiveness Project responded to the request of three fashion accessories brands – Ju Bijoux, Marinelle and Natalya Maskvina – and decided to support their participation at Bijorhca International fashion jewelry show organize in Paris in January 2016. This is due to the efficient previous participation of these companies to this exhibition, which showed good potential in establishing business partnerships and increase export sales. The companies are co-financing rent of the furniture at the stands, as well as travel costs.

A2.2. Activity 2: Consolidate the Din Inima Umbrella Brand and Expand Domestic Market

Help own-brand companies open at least one common multi-brand store under the Din Inima banner. With the support of the CEED I and CEED II projects, the light industry of Moldova has started moving into a new stage of development — manufacturing and selling of “own” products with the highest value addition. Currently, more than 70 own label companies are active. The support has built around increasing brand image, building greater brand awareness on the domestic market through the Din Inima / Branduri de Moldova public campaign, as well as supporting improvement of companies' stores. The Din Inima

initiative has provided valuable gains for the industry, including through the development of shared retail spaces. Taking into consideration that local manufacturers offer good products and have a brand, the store should be the fundamental element that influences the sales. Therefore, under CEED II support, several common stores were opened in Chisinau, such as the store in the commercial center Zorile, in Linella store, and in Ciocana District.

Under this reporting period, the USAID Competitiveness Project decided to keep enlarging the retail network of Moldovan brands by supporting the launch of another common store in Chisinau for Moldovan brands such as Georgette, Alert&Co, Sekana, Premiera Dona and Ionel.

The project is helping this common store with its modern store design and layout, as well as adherence to good merchandising rules. The common store for five Moldovan brands will be located on Moda Center on Stefan cel Mare br. on an area of 230 sq.m. and will be organized by brands and product groups; it will allocate individual open space to participating brands so as it outline their individuality.

The project engaged a technical expert in interior design who worked closely with participating companies in the common store. This technical expert developed the following:

- a. Layout of the common store in sketch and technical drawings with measurements, including trade area, zoning of groups of products and brands (with a specific identification of the space and location of each participating brand), definition of cashier area and change rooms area, circulation and navigation of customers within the trade area.
- b. Design concept of the trade area, in hand and/or computer sketches, that will provide to the Companies the Interior designer's vision of the design of the Common Store.
- c. The interior-design of the Common Store, including:
 - Elaborate of design in sketch and technical drawings, with measurements;
 - Development of blueprints in sketch for lighting;
 - Furniture design recommendations;
 - Recommendations regarding project budget, using the finishing suggested by the designer;
 - Development of recommendations for decoration of pipes and communications if appropriate;
 - Development of a complete design plan, including focus area(s), store display,



cashier area, unique and differentiating ideas for presentation of products in the store, brand-corners.

The common multiband shop is expected to open in February 2016.

Help APIUS enhance the profile of local Din Inima campaigns within the Moldovan market. The USAID Competitiveness Project aims to raise the light industry's profile and boost consumer pride in wearing clothing made in Moldova by enhancing the power of the umbrella brand Din Inima: Branduri de Moldova (From the Heart — Brands of Moldova). The Din Inima initiative has contributed to valuable gains for the industry, sales growth, and retail market expansion.

The challenge for Din Inima is for it to continue to build brand equity around a well thought out marketing and PR campaign. Currently, the Din Inima consists of only two fashion shows per year (spring and fall), associated with three-week advertisement campaign for participating Moldovan companies. The pre- and post-PR is very weak, and the participating companies would like for a part of the marketing/PR initiatives to contribute to growing their sales, in addition to building image. No other marketing activity is conducted under Din Inima during remaining months of the year, which weakens the potential impact of the two annual campaigns.

In this context, the USAID Competitiveness Project contracted the experienced marketing strategy developer, Olga Radu, to work with (APIUS) as the key beneficiary in developing a marketing strategy and a PR plan for 2016 for the Din Inima brand/campaign, that currently joins over 60 domestic producers under one marketing platform. Ms. Radu is the co-author of Din Inima brand, and she has a deep understanding of this project, challenges and opportunities for the future. The assignment started in December 2015 and will last until March 2016.

The marketing strategy will build upon the successful positioning on the Moldovan market of Din Inima so far, in raising the prestige and trust in local fashion among Moldovan consumers. In addition, this marketing strategy will take into account the medium-term objectives to export the Din Inima concept, and to use the Din Inima brand as an umbrella brand for export promotion activities in Europe and in the Region for the Moldovan producers (such as Romania). Finally, the marketing strategy will fulfill two objectives of Din Inima: first, as an image building campaign/brand for the Moldovan fashion and producers, individually, and second, as helping to grow sales of producers participating in the campaign. As such, the image value of Din Inima should be translated into sales growth.

The PR plan for 2016 responds to strategic marketing objectives and will focus on developing a calendar for PR/marketing/sales activities that will be (co)branded with Din Inima. The plan will focus first on the participation of multiple companies.

A2. Objective 3: Improved Sector-Enabling Environment and Increased Capacity

A2.3. Activity 1. Help APIUS Develop an Industry Whitepaper and Advocate for Policy or Regulatory Changes

This activity will be implemented in March-April 2016.

A3. INFORMATION AND COMMUNICATIONS TECHNOLOGY

A3. Objective 1: Increased Productivity and Quality (Better Workforce and Adopted Innovation)

A3.1. Activity 1: Adapt University-Level ICT Education to Industry Needs

Assess skills gap to plan university education improvements. The project continues CEED II efforts targeting workforce development and decreasing skills gaps. Working closely with employers and business associations, the project identified workforce skills as a priority for any business looking to long-term development and willing to remain competitive in the international economic scene.

Especially in the ICT sector, where technological changes are adopted so quickly and the needs are so fluctuating and difficult to predict, the project determined it was important to map out the specific skills gap, in terms of technical as well as soft skills. This will help decision makers develop a strategy for talent management, as well as serve as an important basis for project interventions to improve ICT education.

To implement this activity, the project developed the concept of a skills gaps assessment, using the following approach:

- To identify a foreign consultant familiar with the local context and previously involved in ICT education related initiatives in Moldova, Mr. John O’Sullivan, and to have him develop the methodology and the questionnaires, and conduct the research and interviews with the major stakeholders.
- To contract a local consultant, Mr. Igor Bercu, with extensive knowledge of the skills gap perception from the demand side (employers) and of the educational issues. Mr. Igor Bercu was contracted to team up with the international expert.
- To contract a research company, Magenta, for the quantitative data collection.

The first stage of the assessment and the first visit of John O’Sullivan took place in December 14-18, 2015. In this period, the international and local consultants had several meetings with stakeholders: major universities: TUM, ULIM, ASEM, ATIC, IT companies: Pentalog, DAAC Systems Integrator, Cedacri, Starlab, Bina Systems, JMD Planet. After the interviews, the draft questionnaires for data collection were developed. The survey includes several target groups: employers (companies and e-Government Center), students and young professionals. The project is planning to launch the online data collection after the winter holidays.

A3.1. Activity 2: Improve STEM Education and Promote Tech Careers at the Secondary Education Level

Use ICT for STEM education improvement. STEM literacy is critical to developing the labor force. It opens doors to employment in every industry, sector, and profession — not just in traditional STEM fields — by fostering critical thinking, increasing science literacy, and promoting innovation.

The USAID Competitiveness Project looked for successful models and best practices in the region which were impactful in using ICT for improvements in education. These were researched in order to identify possible cooperation areas, models for inspiration and define the future interventions of the project in the field. The project identified an expert to help — Mr. Balint Magyar, former Minister of Education from Hungary, previously involved in advising the Ministry of Education from Moldova on the educational reform and major legal

acts, such as the Education Code. The project organized his visit to Moldova and a meeting with the Minister of Education to present some possible interventions based on the international experience. Some of the proposals made by Mr. Magyar are very systemic and effective, but also largely outside the scope/budget of the Project. Therefore, the project has to consult with major stakeholders and counter-partners, in order to decide on the approach towards educational initiatives as per the advice of Hungarian expert, namely implementation of ICT in general education, in terms of digital content and school administration.

Motivate ICT learning through Robotics. One of the STEM interventions that started in CEED II that continues to date is the expansion of the robotics program. Towards the end of CEED II, the project donated robotics sets to ATIC which, together with the Ministry of Education later on had selected four educational institutions as beneficiaries.

Teachers from these institutions needed an introductory training. Thus, in October 2015, the project, together with ATIC, organized the ToT for the first group of teachers. As it was planned to expand the initiative nationwide, the application for the training was made public. As a result, 17 teachers from 16 institutions were selected and trained at the Poly-technical College from Chisinau, which has the largest and most successful Robotics clubs. To expand the number of educational institutions teaching Robotics, the project searched for potential suppliers of robotics sets, identified the best supplier and purchased the sets for the endowment of eight new institutions. These eight institutions were selected, together with the Ministry of Education, from 86 applicants, through a competitive process. The criteria used for selection were: the number of pupils, technical capacity and the motivation/ availability of teachers for robotics classes, as well as previous participation at the training on Robotics for teachers. The transmission of the robotics sets to the selected institutions was planned for the beginning of 2016.



Photo credit: Viorica Bordei, ATIC

Photo caption: Robotics Trainer Heilo Altin from Estonia explaining functioning of the sensors to a young Robotics teacher from Artico Children and Youth Center.

One of the activities within the Robotics initiatives is the FIRST®LEGO®League (FLL) robotics competition, which is important for continuity, capacity building, and the motivation of teachers and students. FIRST®LEGO®League introduces young people, ages 9 to 16, to the fun and excitement of science and technology. The next edition of FLL is planned for the end of February 2016 with the topic TRASH TREKSM. This will be organized in close cooperation with the Ministry of Education, ATIC, Starnet and other partners. More than 233,000 children ages 9 to 16 from over 80 countries are expected to be involved in the competition to explore different aspects of trash: from collection, to sorting, to smart production and reuse.

According to the FLL format, in order to include the existing robotics clubs in the competition, the coaches need to pass a specialized training. The project supported the organization of this training by Mr. Heilo Altin, the lead trainer of ONG Robotika from Estonia. Also, during his visit in Moldova, Mr. Heilo Altin followed up on the expansion of Robotics program and provided guidance for the organization of the competition.

The FLL coaches training took place on December 12, 2015, at Artico Center for Children and Youth, where 16 robotics teachers participated. To start preparing for the competition, namely for the Robot Challenge, the Project purchased specially designed mission sets for the coaches, and distributed them to the participating institutions during the training. The date for the second edition of FLL is February 20, 2016. It is expected that 12 -14 teams from robotics clubs will participate at the competition.



Photo credit: Viorica Bordei, ATIC

Photo caption: Robotics Trainer Heilo Altin from Estonia explaining the 2015 FLL Challenge missions to robotics teachers, future FLL teams coaches

A3.1. Activity 3: Link ICT VET with Labor Market

This activity is planned to start in the beginning of 2016 because it is interconnected with another project financed by Austrian Development Agency (ADA).

A3.1. Activity 4: Develop an Entrepreneurial Ecosystem for the IT Sector

Promote entrepreneurship culture through Startup Weekend Moldova.

The Competitiveness Project continues to support the development of the ICT Center of Excellence, implemented by ATIC with the support of CEED II, by providing coaching for the executive team. This Center was designed to offer a combination of best educational practices and latest technologies to help students, industry specialists, and the public to acquire new IT skills and develop new IT-driven products and ideas, including startups.

Text Box 4. Testimonial from the SWM winner

“After Startup Weekend we realized we will need an investor for our project. We started presenting it to various people. As a result, we found an angel investor, which gave us the amount necessary to finish the development and launch the product, expected in six months”.

*Nicolae Moraru,
team leader/founder TroppUs*

In order to ensure the continuous success of ICT Center of Excellence activities, Ionela Titirez, ICT Education and Entrepreneurship Development Manager of the Competitiveness Project, provided mentorship to ATIC to organize the 7th edition of Startup Weekend Moldova. The event took place on November 13-15, 2015, during the Global Entrepreneurship Week, at ZIPHouse. A record number of 103 participants attended the event, of which approximately 40% were students. A number of new partners were attracted to support the event. Eleven mentors, local and international, helped the young aspiring startupper develop their ideas into potential commercial projects. Seventeen projects were presented to the jury and three winners were chosen. The grand prize awarded to the

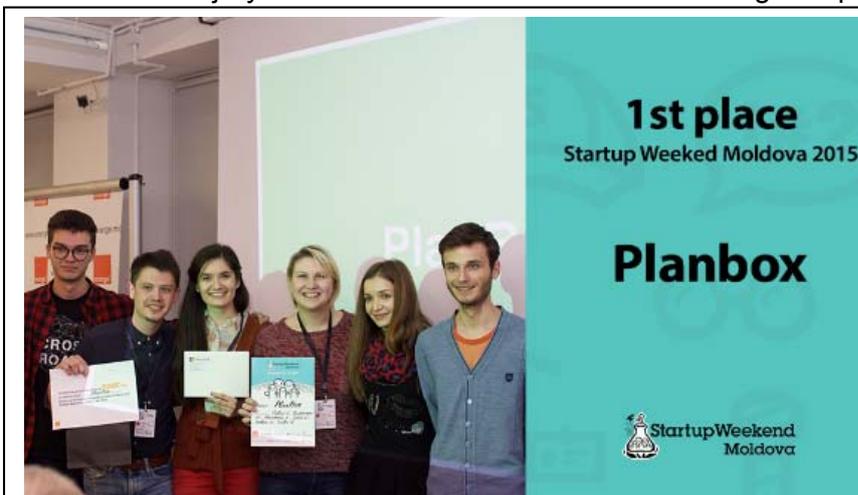


Photo credit: Geo Lupascu

Photo caption: Planbox team, 1st place winner at Startup Weekend Moldova 2015 (from left to right - Vlad Caluș, Nicolae Gudumac, Xenia Munteanu, Elena Mutruc, Veronica Zubcu, Victor Serban)

winning team Planbox was the participation at the Product Bootcamp - initial phase of the startup acceleration program at Spherik accelerator in Cluj, Romania. Later on, Spherik accelerator identified resources to award the same prize to the second place winners – The Vault. Thus, two Moldovan teams attended the acceleration program in Romania.

After the Product Bootcamp, the project helped ATIC organize a follow-up meeting with SWM attendees and winners. The two teams shared their experiences from attending the program and the progress they have achieved with their startups. The other two teams also shared the information on their projects' progress.

Facilitate the creation of infrastructure favorable for IT entrepreneurship. IT and Science Parks are important components of the entrepreneurial ecosystem. In Moldova, there are several initiatives to develop IT parks, but the most advanced one is the initiative driven by a private ICT company called Starnet that already invested more than two million Euros in the future park infrastructure. To finalize the construction of the IT park, Starnet needs to invest an additional sum of eight million Euros. The project will support Starnet in developing the business and investment concept of the IT park that will be used for obtaining the loan guarantee either from World Bank MIGA or from USAID DCA mechanism. The guarantee mechanism will be selected after the business and investment concept is ready because it will dictate the provisions of the loan guarantee that can differ between WB MIGA and USAID DCA.

To develop the IT parks, the project conducted several meetings with potential IT parks investors to identify their expectations and objectives. Project experts developed the TOR for the consultant that will develop the concept, investment and business model of the IT park in the industrial park “Tracom” and Science Park by the Technical University. Using the TOR, a list of world known experts from different countries were identified. In December 2015, project experts had discussions with the identified experts regarding their approach to develop the business and investment concept of the IT park for Starnet. Two experts with extensive background in developing technology parks and investors’ attraction were identified that will perform a pro-bono initiation visit to Moldova in January 2016 to start the analysis for developing the IT park investment concept.

Additionally, the project initiated discussions with the World Bank and GIZ regarding the mechanism and conditions to obtain a MIGA guarantee for Starnet Company in order to obtain additional investments for implementation of the IT park.

A3. Objective 2: Expanded Market Linkages

A3.2. Activity 1: Develop and Propagate IT Solutions for Non-IT Sectors

This activity aims to increase the use of IT products and services by companies from the non-IT sector that on one hand will contribute to their productivity and from the other hand will expand the local market for domestic IT companies.

Conduct a needs assessment and identify existing IT products for companies/industries with similar needs. The project identified a short-term consultant to develop the ICT Needs Assessment for the non-IT industries. In November 2015, the consultant developed the methodology of the assessment. In December 2015 the consultant conducted interviews with non-IT companies to identify their needs for IT products and services. Under this assignment, the consultant put a significant focus on the industries that are benefitting from the project’s assistance such as light industry, wine and tourism industry. The consultant provided the first progress report in December 2015. The consultant will assess the domestic offer of IT products and services based on which, the project will design a program to match the demand of local non-IT companies with the supply from the domestic IT industry. The consultant will conduct in-depth interviews with the representatives of the non-IT companies to assess their IT needs, attitudes and opinions regarding the use of IT products in their companies.

Develop program and action plan to implement IT solutions for non-IT sectors. To expand the usage of IT products and services, the project experts conducted several meetings with the IT companies and business associations such as European Business Association (EBA) and American Chamber of Commerce (AmCham) to design the match-

making events between the local IT companies and non-IT members of those business associations.

A3.2. Activity 2: Develop IT Sector Promotion Programs

Promote IT companies' services and products domestically and internationally. One component for promoting Moldovan companies internationally consists of supporting local companies that successfully developed and implemented IT products for Moldovan market. As the biggest consumer of IT products and services in Moldova is the government, the local IT companies that provided IT services to the government have a potential to enter external markets with the products implemented locally.

During the reporting period, the project conducted interviews with local IT companies to identify their readiness to export their products and services that were successfully implemented in Moldova. The project also held discussions with the e-Government Center in Moldova and World Bank representatives regarding the implementation of e-Government solutions in other countries where World Bank has similar projects.

To promote the IT companies' services and products domestically, project experts agreed with the representatives of AmCham, European Business Association and several IT companies such as Daac system and Bina Systems to organize an event for promoting local IT products to the members of those associations. There will be further discussions with other IT companies to encourage participation at the event.

Develop marketing coaching program for IT companies. During the reporting period the project organized meetings with large and small IT companies to identify potential assistance areas and their marketing needs necessary for accessing foreign markets. Based on the identified needs, the project experts developed a concept for the Marketing Coaching Program.

To increase the export marketing skills of the local IT companies to access foreign companies, the project designed a Marketing Coaching Program. Discussions were held with international consultants Laszlo Klucks (CBI) and Till Hahndorf to discuss the approach of the marketing coaching program based on which the concept was adjusted. After the discussions with both candidates regarding the approach, it was decided to contract Mr. Till Hahndorf who specializes in attracting Moldovan IT companies to German IT Market which is the most attractive EU market of IT products and services. Mr. Hahndorf will organize matchmaking between German and Moldovan IT companies.

A3. Objective 3: Improved Sector-Enabling Environment and Increased Capacity

A3.3. Activity 1: Draft ICT Sector Strategic Development Roadmap

Organize the CEE Changers Challenge – Moldova. The ICT Sector Strategic Development Roadmap will represent the plan of immediate, medium and long term activities necessary to be undertaken by the Government and stakeholders involved in IT industry development such as donor community, ATIC and private companies necessary for ICT sector development. The drafting of the Strategic Development Roadmap is a participative process that will involve the participation of internationally well-known ICT industry development experts. To set up the foundation of the ICT Sector Strategic Development Roadmap, a CEE Changers Challenge event will be organized that will involve the participation of international ICT industry experts. An individual consultant, Ms. Anca Albu, has been identified to organize the CEE Changers Challenge event that will take place

during the ICT SUMMIT in Moldova. Ms. Albu will be responsible for identifying event participants, crafting the agenda, moderating the event, and drafting the initial version of the ICT Sector Strategic Development Roadmap based on the input collected during the CEE Changers Challenge event. In December 2015, Ms. Albu delivered the concept of the Changers Challenge event and drafted the list of participants at the event.

A3.3. Activity 2: Support to the Government of Moldova as it implements IT Industry Development Policies

Assist MICT in implementing the IT Parks Law. Currently the Ministry of ICT lacks capacity in implementing IT policies and manage the implementation of IT sector development programs. This constraint can be minimized by assisting the Ministry of ICT in implementation of the recent developed IT Parks Law and inclusion of the Ministry in the public budgeting process to obtain financial resources for implementing Digital Moldova 2020 strategy and IT Industry Competitiveness Strategy.

The USAID Competitiveness Project will continue the efforts of another USAID-financed project, Moldova BRITE, which provides assistance to the Ministry of ICT to identify a model for implementation of the IT Parks Law.

During the reporting period, project experts had several discussions with the USAID BRITE Project regarding the potential assistance for IT Parks Law implementation mechanism. They discussed the possible models and taxation mechanisms with the representatives of the Ministry of ICT and BRITE.

Project experts conducted several meetings with the representatives of the Ministry of ICT and USAID BRITE Project to define the necessary steps to implement the IT Parks Law. The IT Parks Law provides a set of incentives for the ICT sector provided by the Government to stimulate the growth of the sector such as tax incentives, reduction of the state inspections, customs duties and VAT tax minimization. The IT Parks Law will serve as a demonstration of transparency and predictability of the legislation regulating the ICT sector and Government's support for the industry. The current version of the law is stuck in the parliament because of the existing gaps regarding the implementation of several law provisions such as mechanism of distributing the single tax, conducting of common tax inspections and ICT hardware import customs duties. Project experts collaborated with the Ministry of ICT, USAID BRITE Project and Price Waterhouse Coopers Company responsible for developing the law, in resolving and eliminating the issues raised by the Parliament that prevent the adoption of the law.

Include MICT in the medium-term state budgetary process (i.e. Rom. CBTM).

Concerning the budgeting process, project advisors had discussions with the representatives of the Ministry of Finance to include necessary activities of the Ministry of ICT in the budgeting process. Based on the results of the discussion with the Ministry of Finance, the project had a planning meeting with the Ministry of ICT and agreed on the roadmap of activities for November-December 2015 which resulted in a justification document for the Ministry of Finance. This document was reviewed and agreed upon by the Deputy Minister of ICT, and it contains the priority activities for the ICT sector that have a critical need to be financed by the state budget. After the setup of the new government in January 2016, project experts will facilitate and moderate the negotiations between the Ministry of ICT and Ministry of Finance.

A3.3. Activity 3: Support ATIC

Help ATIC develop advocacy capacity. The Moldovan Association of Private ICT Companies (ATIC) plays a vital role in the development of the IT sector. Increasing its lobby and advocacy capacity is therefore one of the project's priorities for year one. The project

envisioned that ATIC will get coaching from other associations which are more powerful and successful in advocating for their members' interests.

The project had several discussions with the American Chamber of Commerce business association from Moldova to discuss potential AmCham support to Association of Private IT Companies (ATIC) in increasing the capacity for lobby and advocacy. It was agreed that a general training for the ATIC staff will be conducted that will be followed by a 4-6 months coaching program that will target specific real problems faced by the IT sector in Moldova.

To support ATIC and other associations, project experts developed a concept for creating the National Business Associations Platform and coordinated it with USAID BRITE Project. The SOW for the consultant was developed and the consultant was identified. Starting in January 2016, the consultant will start providing assistance to ATIC and other business associations to increase their lobby and advocacy capacity.

Project experts also had a meeting with Mr. Theodore Kutsobinas regarding an upcoming EU project expected to start in February 2016 and which has as one of its objectives to increase the Moldovan business associations' capacity of advocacy and communications. A shared plan of activities for assisting ATIC and other business associations will be developed in January 2016.

Strengthen ATIC capacity to comply with USAD procedures for establishing and managing the ICT Center of Excellence. To help the Association of Private IT Companies (ATIC) better manage the "Development of Information and Communication Technology (ICT) Excellence Center in Moldova" activity, the project contracted Ms. Barbara Yale, a Capacity Building and Compliance Specialist: Barbara Yale, to provide assistance.

Ms. Yale identified critical missing policies and procedures and helped ATIC's management review, draft and finalize the following documents in compliance with USAID's recommendations:

- Policies and procedures for preparing/conducting audit including provisions for closing audit findings and recommendations to enhance operational and financial management;
- Procurement Policy, including a system for procurement monitoring;
- Personnel Policy Manual and HR policies compatible with the USAID agreement terms and the documentation and other requirements involved in the cost principles;
- Accounting and Financial Policies;
- Car rent and usage policy and procedures.

Develop the English version of the Legal Pocket Guide. When ATIC developed the first Legal Pocket Guide for IT companies in 2013, updating it in 2015, the guide was in the Romanian language only. It limited foreign potential investors to use it. During the reporting period, the project helped translate the Legal Pocket Guide for IT companies into English and had it reviewed by a law firm. The Legal Pocket Guide will be distributed by ATIC to its members and will be provided as a commercial product to non-ATIC members.

A4. CROSS-CUTTING ACTIVITIES TO SUPPORT IMPLEMENTATION

A4.A. Workforce and Innovation

The USAID Competitiveness Project supports workforce development initiatives in order to promote the development of skills that Moldovan businesses need. This will contribute to the achievement of one of the project objectives - Increased Productivity and Quality (Better Workforce and Adopted Innovation).

The workforce development is a key cross-sector element of the project. During the reporting period, the project started the Skills Gap Assessment activity. Its goal is to identify the gaps in the set of skills and competences that undermine the current performances and determine the level of competitiveness of the following industries in Republic of Moldova: Information and Communications Technology (ICT), light industry, tourism sector and wine industry. The following progress per industries was registered in the reporting period:

- For the wine and tourism industries, the project launched a skills gap assessment. This is an important activity for the wine and tourism cluster since it faces immediate shortages in skilled workers and management know-how. Most of the industry's workforce were trained using Soviet curricula and are not acquainted with modern practices and technologies. The change of the industry product quality paradigm (from high volumes to higher quality) demands the adaptation the sector's workforce capacities to the new needs of the wine business.

The launched skills gap assessment started with desk research and preliminary interviews. Focus groups activities with industry representatives were performed together with the Subcontractor JAA. During these stages, the list of questions to be addressed during the survey, preliminary job roles and professional skills specific for industry, the size of sample and selection of sample, some methodological directions for survey performance were defined. The Terms of Reference for survey on selected sample of companies were developed. Magenta Consulting SRL was selected for carrying out the survey for skills gap analysis.

- For the light industry, the project launched a skills gap assessment. It was initiated in order define ways to improve education in professional schools so that graduates possess the skills employers need. It followed the same steps as in wine and tourism industries. Also, the local subcontractor, Magenta Consulting, will carry out the survey for skills gap assessment.
- For the ICT sector, the project launched a skills gap analysis. With rapidly changing needs in the IT sector, the skills gap analysis will identify areas where the education sector can do more to promote a greater balance of skills to meet industry demands. The focus will be on identifying skills that can be taught through economically sustainable training programs, with high levels of certification and placement, with industry sponsorship and leadership of subsequent programs wherever possible. The analysis started with desk research and preliminary interviews with reps of industry. The interviews were carried out by international expert John O'Sullivan and national expert Igor Bercu. A survey on a representative sample of companies, students and young professionals will be carried out by the selected research company Magenta Consulting SRL. The company will present the results of survey at middle of March 2016.

A4.B. Sector Engagement, Enhancement, and Development (SEED) Fund

The USAID Competitiveness Project has an allocation of \$ [REDACTED] under the SEED Fund to invest in targeted activities to enhance local capacity and spur innovation in the wine and tourism, ICT, and light industry sectors of the Moldovan economy. The results-based grant fund will serve as a catalyst to leverage additional private and public investment—through public-private partnerships—to promote innovative ideas and new technologies. This fund will also collaborate on product marketing and promotion; help producers achieve international quality standards; and conduct specific related research, workshops, training events and public awareness initiatives to achieve greater impact, sustainability and growth within the targeted value chains and companies.

In November and December 2015, the project hired a SEED Fund Manager, who traveled to post in November 2015, and selected a Grants Specialist who will support the SEED Fund Manager in all Fund-related activities. In November 13, 2015, the Project presented to USAID its Grants Manual. The Organizational Capacity Building Plan was submitted for approval on November 25, 2015. Both contractually required documents have been approved. Additionally, the SEED Fund Manager conducted an all-staff grants training session to explain the rules, regulations, and procedures governing grants under contract (GUCs). Grants planning sessions with technical leads from each of the industries were conducted to identify priority activities, identify type of mechanism to be used (RFA, APS, FAA, or in-kind etc.), and generate a timeline, among other topics of discussion.

In November 2015, at the initiative of USAID COR Mr. Sergiu Botezatu, the project held a meeting with the Western NIS Enterprise Fund representative to explore potential future partnerships. The project generated a list of partnership areas, which it shared with the Fund, and is planning a follow up visit to Kiev, Ukraine to meet with the Fund.

In line with the recommendations of the Initial Environmental Evaluation (IEE) 2015-MOL-001, the project started to work on a programmatic Environmental Management and Mitigation Plan (EMMP) that will delineate its environmental due diligence approach and identify and assess potential environmental impact of the planned activities with a view to eliminate or reduce them through appropriate mitigation measures and monitoring protocols. With the support of short term environmental expert, Michelet Fontaine, the EMMP will be finalized and submitted in the next quarter.

A4.C. Local Capacity Building Program

In Year 1, the project will adapt the Organizational Capacity Assessment (OCA) Tool to identify and assess the capacities and high-priority capacity gaps of key counterpart organizations in the wine and tourism, light industry and ICT sectors—such as ZipHouse, ANTRIM, ASW, and SEC. In November 2015, the project presented the Local Capacity Building Plan to USAID. Swift approval on the part of USAID on December 1, 2015, allowed the project to conduct several brainstorming sessions with the technical team to discuss and tailor the Organizational Capacity Assessment (OCA) self-assessment tool to the needs of the project and the Moldovan context. Implementation of the OCA will start in the second quarter of Year 1.

A4.D. Increasing Access to Finance through Development Credit Authority activity

The project aims to increase access to finance for companies from targeted sectors. Through this activity (by increasing the availability of credit to companies), the project will contribute to improve economic foundation for growth and will improve private sector competitiveness.

Access to finance is an important crosscutting issue for the USAID Competitiveness Project because Moldova's credit market is still severely undeveloped; many enterprises in target industries consider access to financial resources costly and securing loans difficult. Additionally, Moldova kept suffering from political and economic challenges that keeps the credit market undeveloped: the repeated Russian embargos on Moldovan trade in 2013; the restrictive European market for certain Moldovan products, which forced many companies to exit unprofitable business lines and reorient to other sectors in order to better integrate in EU; and the current deplorable situation in the banking sector as result of corruption in the banking sector (large frauds schemes in three banks that influenced entire banking system which were implemented and as result in November 2014 \$1 billion disappeared from Moldova's banking sector— a sum equivalent to 15% of the country's GDP).

The USAID Competitiveness Project will ensure increased access to finance for companies in the targeted sectors, through DCA activity. This activity continues the direction taken by the CEED II Project, when the current DCA agreements were signed (September 2011) and currently under implementation in two financial institutions, Comertbank and Prime Capital.

During the reported period, the USAID Competitiveness Project provided ongoing assistance to the DCA guarantee partners (Prime Capital and Comertbank) through regular communications, advising on applicants' eligibility for particular sector products; linking partners with USAID; consulting on contract implementation, including support for preparing biannual reports; and participating in meetings focusing on increasing DCA utilization.

On December 3, 2015, the project organized a site visit to Comertbank. At the meeting, there were representatives from USAID, USAID Competitiveness Project and Comertbank: Sergiu Botezatu, USAID Senior Project Manager, Doina Nistor, USAID Competitiveness Project Chief of Party, Ruxanda Cheibas, USAID Competitiveness Project M&E Manager and Access to Finance Coordinator; Serghei Cartasov, Comertbank President and Elena Barbaros, Chief Commercial Department.

The meeting was organized for the following reasons:

- It was the first site visit of a new assisting partner - USAID Competitiveness Project. The bank was informed that the DCA assisting partner is the USAID Competitiveness Project implemented by Chemonics International, past DCA assisting partner, thus, the people involved in DCA supporting activities are the same and well informed to offer qualitative support.
- It was the end of calendar year 2015, and each year a site visit is undertaken by USAID representatives to discuss the challenges and the achievements in the field of DCA.
- It was necessary to establish a date for the annual monitoring according to the Development Credit Authority (DCA) Monitoring Plan for DCA Loan Portfolio Guarantees.

During the discussions, there were remarks about the great achieved results after the DCA contract amendment from May 20, 2015 that enlarged the definition for the qualifying borrowers. In the period from May 30, 2015 to October 15, 2015 (last reported day) the amount disbursed valued at \$1,317,227, while the total disbursed amount from September 2011 to October 2015 valued at \$2,423,376. In other words, in 3,5 years (October 2011- May 2015) \$1,106,508 was disbursed, which was less than in the last two quarters. The bank was encouraged to keep being active in identifying borrowers and specific situations have been discussed. Additionally, it was agreed to organize the annual monitoring visit.

Due to the fact that the final placing date under DCA is March 2016, Comertbank demonstrated interest in starting a new DCA agreement. In the event it will be initiated,

Serghei Cartasov, Comertbank President proposed enlarging the definition for borrowers to include the waste recycling industry or green sector, to cover also energy efficiency and other sub-sectors.

A meeting with Prime Capital was scheduled for December 28, 2015 for the same three reasons mentioned above. Due to the fact that the financial institution has two DCA agreements – one signed with USAID and the second one signed with USAID in partnership with Sida – the meeting was postponed for January 2016 per Sida request.

In December 2015, the Project's M&E and Access to Finance Specialist, Ruxanda Cheibas, visited both partners in order to review performance and document significant changes in the partner's management. Another goal of the visits was to ensure that the DCA is utilized properly, according to the Guarantee Contract clauses, to collect additional information and indicators related to Partner's activity, as well as to determine the outputs, outcomes and impact of DCA guarantee usage.

The visit to Comertbank took place on December 9, 2015, while the visit to Prime Capital took place on December 15, 2015. During the monitoring visit, the loan files were verified to be in accordance with the Loan guarantee agreements, namely: the institutional document package of the company, which confirms the connection with targeted sectors or its value chain (the qualifying borrower, the loan applications, the internal loan files and payment documents which confirm the loan destination); compliance with environmental local regulations, as well as the requirements stipulated in the DCA agreements related to environmental compliance and anti-terrorism checking; and correct reflection of the loans in the Credit Monitoring System (CMS). After the visit, memorandums were prepared for both partners.

B. DELIVERABLES

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

Deliverable Name	Submission Dates
Project Work Plan: Year One, FY 2016: September 30, 2015 – September 30, 2016	October 30, 2016
Performance Monitoring Plan (PMP)	Draft: November 13, 2015 Final: December 21, 2015/ December 30, 2015
Grants Manual	November 13, 2015
Organizational Capacity Building Plan	November 25, 2015
Updated Branding Implementation and Marking Plan	December 14, 2015 (approved on December 17, 2016)
Quarterly Report, October-December 2015	January 19, 2016
Monthly Report, November 2015	December 14, 2015
Monthly Report, October 2015	November 12, 2015

SECTION II

RESULTS AND IMPACT

A. QUANTITATIVE RESULTS

A1. Monitoring & Evaluation

General. Throughout the first reporting period, the project successfully initiated project M&E activities. During October and mid-November 2015, the project focused on developing the Project Monitoring and Evaluation Plan (PMP). To receive additional guidance on indicators elaboration, on October 19, 2015 USAID Moldova facilitated a meeting with Kraemer Lovelace, M&E expert, USAID/Washington, Sergiu Botezatu, USAID Senior Project Manager, USAID/Moldova, and Lucia Martinenco, Program Development Specialist, USAID/Moldova, Doina Nistor, project's COP, Diana Lazar, DCOP, and Ruxanda Cheibas, projects M&E Manager and Access to Finance Coordinator.

On November 14, 2015, the project submitted the draft PMP for USAID's review. The Project PMP integrated the project's technical approach, proposed activities, organization, and Monitoring and Evaluation (M&E) system under a unified strategy, demonstrating rigor, feasibility, and consistency. It contained the initial set of indicators that were included in technical proposal and in the award contract.

On December 16, 2015, USAID facilitated another meeting with project's and USAID's M&E specialists, including Matthew Carpenter, M&E Specialist, USAID/Washington. Following the discussion, the following changes were introduced to the project's PMP to closer align it with USAID Moldova Mission country strategy and PMP:

- a new indicator was added - "Percentage change in specified productivity measure (sales per employees)" – which is also relevant for the project objectives;
- the indicator "BSPs receiving project related capacity building to improve their ability to offer market-oriented product offerings" was excluded from the following considerations: after developing the Work Plan for Year 1 and starting project technical implementation it was clear that this indicator is not relevant and not directly producing an impact.

The final PMP was submitted to USAID on December 21, 2015. It was approved on December 30, 2015. It incorporated the above mentioned updates, and also included templates for the Memorandum of Understanding (MOU) for the enterprises and all types of institutions, as well as a template for data collection for the companies with signed MOUs. Additionally, all project annual targets were adjusted to be cumulative.

The next step is to have an M&E data tracking system. The project's team researched several options for tracking M&E data: to adjust a Chemonics database for M&E (DevResults), to develop an improved version of M&E database used by CEED II project, or to develop a new solution. Final decision will be made in the second quarter.

Inclusive Development. The USAID Competitiveness Project will mainstream inclusive development throughout the project's activities.

The project designed activities for groups that have historically been excluded or disadvantaged, especially women and youth; specifically, VET and educational opportunities to enhance skills and employment opportunities. In the ICT industry, the project procured Robotics sets to donate to several schools in order to develop their IT skills. Additionally, the project intensively collaborates with ATIC; in this reporting period, the project supported the

seventh edition of the StartUp Weekend, an event aimed to promote entrepreneurship. During this reporting period, the StartUp Weekend was attended by 103 participants, more than 80% representing youth up to 35 ages, half of them students.

One of the goals of the USAID Project is to collaborate with companies from all of the country's regions, including Gagauzia and Transnistria. In the first quarter, the project provided assistance to wine companies from the Gagauzia region, such as Vinuri Comrat and Tomai Vinex that participated at the Wine Vernissage on December 21, 2015. Additionally, the project collaborates with ONVV; through this organization, the project's support to the companies from Gagauzia region was enhanced: ONVV supported direct funding of the Wine Festival of Gagauzia (2015 autumn edition -on November 8, 2015). With ONVV support at the Good Wine trade fair participation, Vinuri de Comrat managed to importantly increase sales due to an advantageous contract signed with a Romanian partner.

In the light industry, the project started collaboration with companies and the largest employers from Transnistria, such as Intercentre Lux, Odema, Floare and Tighina. During the reported period, Odema participated in the productivity enhancement activity, such as study visit in Romania. Additionally, all aforementioned companies are collaborating with the project in order to develop business linkages and penetrate new markets through participation in trade fairs & B2B events such as Premiere Vision (France), Textilegprom (Russia), CPM (Russia), GDS (Germany), Leather & Shoes (Ukraine) which will take place in January- February 2016.

A2. Progress towards quantitative indicators targets.

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

B. Qualitative Results

B1. Wine and Tourism Industries Results

- ASW signed a contract with a new importer. As a result of the ONVV and ASW's participation at the Good Wine trade fair, and activities around the event and a strong pre&post PR campaign, the ASW agreed on a contract signing with a new importer that was negotiated for long. The importer will ensure the presence of wines from several ASW members: Carpe Diem, Vinaria DAC, Minis Terrios, Gogu Winery – on top of the members already on the market: Et Cetera and Equinox. Additionally, newly introduced larger wine producer, Vinuri de Comrat, reported a significant contract signed with a Romanian partner.
- Two companies entered into restaurants' menu with no listing fees. Mezalimpe and Cimisia wineries, as a result of Wine Friendly program and tasting events under this program, are now featured on the menus of Pegas and QBar with no listing fees. Additionally, Vinaria Tiganca (Gitana) introduced the newly launched wine – Reihn de Riesling Manastirea Rohrbach into Kiku Stake and Wine list.
- Seven tourism professionals participated in a study visit in Romania. The project assisted 7 representatives from the tourism industry: National Tourism Agency, ANTREC, ANTRIM, Rustic Art, Casa de sub Stinca rural pension, Rural Pension Owners Association "Cheia Satului" to participate at a study visit to Romania. As a result, all the participants have gotten a new vision on how rural tourism should be developed and promoted in Moldova.

- Six Moldovan tourism operators participated at IBTM Barcelona MICE (Meetings, Incentives, Conference and Events) Fair. The project assisted three Moldovan DMC's (Amadeus Travel, Tatrabis, Solei Turism) and three event organization companies (AQA logistics, Park Communication, Berlizzo) to participate at IBTM Barcelona MICE event. The participants have learned how best MICE countries developed this tourism direction, new technologies and what are expectations of the international companies in this field.
- The biggest Moldovan DMC participated at Travel Bidder (MICE B2B Event) in Poland. The project supported the premier participation of Tatrabis DMC (Destination management Company) at Travel Bidder (MICE B2B Event). The company director has had 16 dedicated successful meetings, from which seven with potential of creating partnerships.

B2. Light Industry Results

- Five small companies launched innovative methods for workplace organization. Three apparel companies (Vistline, Olga cegan and Ziva Maxi), one footwear and one accessories companies (Oldcom and Bit Program), with the support of local consultant, detected inefficiencies in use of working time and developed a plan to increase productivity.
- More than 400 attendees participated at one of 20 workshops and events organized by ZIPhouse, jointly with APIUS, including community building events, workshops on using special software and equipment, building textile library etc. ZIPhouse also hosted four events organized by other parties. 34 access cards were sold to ZIPhouse community members.
- Best practices were shared at the ZIPhouse institutional organization, as well as a plan of activities, while the Project team started developing the concept for a Design Thinking Lab (tbc) to be created within TUM, as a part of the "education excellence hub" in connection with ZIPhouse and Tekwill, as a result of lessons learned during the study visit to similar Estonian excellence, acceleration and development centers. A delegation of 9 people formed of representatives from ZIPhouse, TUM, the USAID Competitiveness Project tech' teams and IT private sector visited 10 relevant institutions
- An action plan was developed that include preliminary steps and draft recommendations for introducing enriched education for light industry at TUM, to sign the memo of collaboration with one or several universities from Italy, based on the first intervention of contracted Italian expert in Fashion Design, Francesco Veneziano, to help establish joint degree program for Fashion Design students and specific programs for professionals.
- Eleven Moldovan apparel companies learned best practices in production organization of successful European textile manufacturer and understand the benefits of investing in it. Big and medium size Moldovan companies that provide mostly services for foreign clients (Tricon, Ionel, Mobile, Portavita, Artizana, Odema, Maicom, Canindsport, Ecotextil Grup, Premiera Dona, Saltoianca) went on a study visit to SORSTE apparel company in Romania to learn the most effective methods to increase productivity.
- Five Apparel companies will open a common multi brand store. Another common store will open for Moldovan brands such as Georgette, Alert&Co, Sekana, Premiera Dona and Ionel. The common store for five Moldovan brands will be located on Moda Center on Stefan cel Mare br. on an area of 230 m2 and will be organized by brands and product groups.

B3. Information and Communications Technology Industry Results

- Eleven TIC policy documents and document templates which are part of ATIC internal regulations were reviewed and adjusted according to USAID procedures. This ensured

the conformity of ATIC activity in developing and managing the ICT Excellence Center (TEKWILL).

- English version of the Legal Pocket Guide was finalized and starting January 2016 all ATIC members will have access to it. The Legal Pocket Guide represents an incentive for all non-ATIC members to become part of the Association. All potential foreign investors in IT sector will have access to information about the business environment for the IT sector in Moldova.
- 17 teachers from 16 institutions joined the Robotics teachers' community, thus being able to implement the program when the robotics equipment becomes available in their schools.
- Twelve experienced Robotics teachers attended the training for FLL teams' coaches, and received the necessary equipment, which will allow them to prepare robotics teams for the competition. The participation of the teams in FLL, led by their teachers, acting as coaches, will ensure their high motivation and will increase interest toward the robotics initiative in the educational institutions and the public.
- ATIC successfully organized the 7th edition of Startup Weekend Moldova, which attracted a record number of 103 participants, of which 40 students. 11 mentors, local and international, guided the startup teams to develop their projects. Immediately after the event, two winning teams attended the Product Bootcamp - initial phase of the startup acceleration program at Spherik accelerator in Cluj, Romania. The third winning team attracted an angel investor, which gave them the amount necessary to finish the development and launch the product, expected in six months.

B4. Cross-Cutting Activities Results

Workforce and Innovation

- Within the light industry, the process for establishing a joint degree program with Italian Universities for Fashion Design student was initiated. Preliminary discussions took place in December 2015 between TUM leadership and Italian expert in Fashion Design, Francesco Veneziano, regarding the establishment of a joint degree program for Fashion Design students. An action plan was developed that include preliminary steps for signing the memo of collaboration with one or several universities from Italy. The focus is on Fashion Design and Industrial Design, Architecture design, web design.

Development Credit Authority Activity

- Ongoing assistance to USAID DCA Guarantee Partners was provided. The Project started the communication with and provided advice to financial institutions implementing the DCA activities.
- Three meetings with DCA partners successfully organized. The main purpose of the two visits to Comertbank was to discuss how to increase DCA utilization until the final date for placing under DCA (in March 31, 2015) and to consult a monitoring of the files. A monitoring visit was also organized at the Prime Capital.

SECTION III

HIGHLIGHTS OF ACTIVITIES PLANNED FOR FY16 Q2 (JANUARY–MARCH 2016)

A. Wine and Tourism Industry

- Finalize skills gap analysis for wine industry and proceed to drafting the concept for Wine Academy;
- Monitor the implementation of traceability software and ensure installations at as much companies as possible in order to gain credibility and trust from industry stakeholders and state officials;
- Develop a promotional plan for Wine of Moldova; finalize the development of content for Wine of Moldova website; develop a social media strategy and SEO/SEM plan for its website;
- Develop concept of the national wine contest;
- Assist ONVV in development and implementation of the communication plan around participation at ProWein;
- Implement an Export Coaching Program (ECP) - identify experts on target markets to deploy the ECP program; develop and implement the promotional plan for ASW; hire local experts to facilitate the entrance of ASW wines to new markets; assist ONVV in development of concrete promotion programs aimed at sales increased in key-accounts on target markets;
- Finalize the domestic market research, organize a public presentation and presentation for press;
- Deploy the second wave of accreditations and communication of the Wine Friendly program;
- Finalize the business intelligence deliverables, test them with the industry stakeholders, prepare a plan for process institutionalization and putting it on rolling basis;
- Support local tourism companies' participation at tourism exhibitions - Vakantiebeurs Netherlands, TTR Romania, Poznan Poland, ITB Berlin;
- Support MICE tourism development through coaching program organization;
- Support rural tourism and wine tourism development, through coaching sessions and grants program;
- Develop a PR and communication plan for Polish, German and Romanian markets;
- Support the organization of familiarization tours for partners;
- Support ANTRIM's capacity building through grants program;
- Support public - private partnerships for Orhei Vechi development.

B. Light Industry

- Continue building ZIPhouse capacity and content - develop guidelines; establish potential collaboration and joint programs; ZIPhouse digital marketing; implement the activities plan;
- Design and launch the Career in Light Industry promo campaign;
- Design coaching program: select participating companies and provide the assignment;
- Assist companies to implement the recommendations for productivity enhancement;
- Start the productivity enhancement program
- Launch the implementation of the Quality control system: identification of companies for assistance, discussion with World Bank and EBRD-BAS to merge efforts in implementation of different quality standards;

- Start implantation of innovative technical solutions - identification of areas for assistance and companies and to decide the concept/procedures of assistance;
- Explore the opportunity to enter in Romanian market - identify the place, the date, appropriate participants;
- Prepare the visit of apparel companies that produce under their own brand at raw material warehouses in Pratt region, Italy;
- Develop the Promotion Strategy of the Din Inima umbrella brand; develop and launch the spring Din Inima Campaign.

C. Information and Communications Industry

- Finalize the ICT Skills Gap and publish the results;
- Develop the concept for STEM education improvement at the national level;
- Continue to work on the expansion of Robotics initiative, distribute the first lot of Robotics sets to selected institutions and organize a ToT for new institutions;
- Keep providing mentorship to ATIC in implementing Tekwill project;
- Continue the support to private initiatives aimed at developing the entrepreneurial ecosystem, develop the business and investment concept of the IT Park implemented by Starnet Company (████████████████████);
- Define the loan guarantee mechanism to use for Starnet IT Park for raising additional financing (██████);
- Work on the organization of Moldova ICT Summit and Changers Challenge;
- Finalize the ICT Needs Assessment for the non-IT Industries and design a grant program to introduce ICT solutions to the industries that receive assistance from the USAID Competitiveness Project (████████████████████);
- Start the Marketing Coaching Program for accessing German market of IT products and services (████████████████████);
- Start the development of the Global IT Sector Positioning Strategy for Moldova (████████████████████);
- Contribute to the approval process of the Law on IT Parks;
- Assessment of the lobby and advocacy capacity of ATIC and development of a roadmap for gaps elimination (████████████████████).

D. Cross-Cutting Activities

D1 Workforce and Innovation

- Monitor Magenta activity within Skills Gap Analysis: Confirm moderator's guide, approve questionnaire for assessment of skills gap light industry on January 20, 2016; for tourism sector on January 27, 2016, for wine industry - 3 of February 3, 2016.
- Make arrangements for international experts from JAA subcontractor (████████████████████) regarding the interpretation of skills gap analysis results and formulation of recommendations for sector development;
- Continue working on determining optimal formula for collaboration with Italian Higher Education Institutions and to develop joint degree in Fashion Design Program;
- Identify possibilities to use Erasmus + funds for facilitating the application of Moldavian students from Fashion Design Faculty to joint degree program;
- Develop preliminary concept for Design Lab;
- Prepare the MOU between the Project and Technical University of Moldova regarding the establishment of Design Lab;
- Facilitate the process of participation to the Project Based Learning Training, for Fashion Designs Faculty reps and Industrial Design Faculty reps.

D2 Sector Engagement, Enhancement, and Development (SEED) Fund

- Complete and present the programmatic Environmental Management and Mitigation Plan (EMMP) for approval to USAID. The EMMP will provide an overview of the environmental due diligence to be applied by the USAID Competitiveness Project;
- Prepare and conduct in depth grants training for Grants Specialist during the month of January;
- Conduct grants brainstorming meetings with the board of directors of various industry associations and key partners such as National Association for Inbound Tourism (ANTRIM), Employers Association of Light Industry (APIUS), and ZipHouse Fashion Accelerator, among others;
- Initiate Organizational Capacity self-evaluation process for key partners – National Office for Vine and Wine (ONVV), Association of Small Wine Producers (ASW), ANTRIM, APIUS, Moldovan Association of Private ICT Companies (ATIC), and ZipHouse;
- Develop program statements and launch the first Requests for Applications (RFA) for grant in all Project supported industries – ICT, wine and tourism, and light industry.

D3 Development Credit Authority Activity

- Provide ongoing support to DCA partners and organize visits to Comerbank and Prime Capital related to the end date of Placing Qualifying Loans under Coverage (March 31, 2016) and steps to be further undertaken;
- Organize a joint meeting with USAID, Sida, USAID Competitiveness Project, and Prime Capital to analyze the DCA agreement performance according to for the energy efficiency agreement. Prepare a visit memo for the files.

SECTION IV

START-UP ACTIVITIES AND ADMINISTRATIVE SUPPORT

A. Project Communications

General. Throughout the reporting period, the project main communications efforts were focused on the development and production of the basic project communications materials that would be compliant with the USAID branding regulations, and followed by the project team members in their everyday communication with the stakeholders. In this reporting quarter, Doina Nistor, Project COP, Diana Lazar, Project D-COP, Ruxanda Cheibas, M&E Manager and Lisa Gihring, Chemonics Home Office consultant on Communications, had several internal meetings on Project Communication in order find best solutions for the development of the project communications.

On November 5, 2015, a first meeting on project communications with Roman Purici, USAID Development Outreach and Communication Specialist took place. The meeting was focused on general aspects of project communication and on USAID policy updates in this field. The project was informed on the new polices related to the project names – to avoid acronyms, especially in external communication for emphasizing the donor name and increase its awareness. USAID recommended moving from CE-WIN Project name to the USAID Competitive Project name. As one of the first steps in this direction was to update the Branding Implementation Plan and Marking Plan. As result, the document was updated and submitted to USAID on December 14, 2015 receiving USAID received concurrence on December 17, 2015.

The next initiated step in project communication was the identification of a local communications consultant, Andrei Cibotaru, to develop an institutional PR & communication plan for the Project that would respond to the objective of having an efficient and streamlined communication related to the USAID funded activities. The main assigned tasks to the consultant are: to elaborate PR communication strategy and plan, develop an institutional communication & PR strategic paper for the project (key objectives, key messages, key target audience; key media to use; activities and events to generate awareness; typology of media/PR/communication products to use); to develop the TOR for a local PR&Communications agency to be subcontracted by the project.

Below are highlights of communications products created during the reported period:

- Project description was submitted to USAID/Moldova Mission and to the Ministry of Economy.
- Project logo in English & Romanian versions, related templates, project fact sheet, project banner, business cards for the project employees, etc. were developed and are used for the project communications purposes, following the USAID branding guidelines. The project power point template is under elaboration.
- A mutually beneficial, leveraging project resources, contract with Infotag News Agency was negotiated and signed. The project will place free of charge on Infotag website www.infotag.md the banner of the USAID Competitiveness Project and press releases about the project activity –twenty-four press releases per year; when necessary, will organize, free of charge, press conferences at Infotag's press center and will include information on the USAID Competitiveness Project activity in its daily news bulletins. It will also publish articles about the project's developments and successes in the monthly economic magazine „Banks and Finance Profit”.
- Elaboration and submission to USAID of the monthly public project events as well as other communications notes (participation at TV shows, press releases, etc.)

Media coverage. During this reporting period, project activities started to be highlighted by the mass media. The Appendix II include the list of selected publications and other communications products and media outlets for the period of October -December 2015.

Stakeholder meetings. Introductory meetings were held with key ministries, including the, Ministry of Economy and Trade, and Ministry of Information Technology and Communication to inform them about project activities. In addition, many meetings were organized with other project stakeholders and businesses.

Site visits: The project organized two sites visits to factories, Ionel (in Chisinau) and Intercenterlux (in Transnistria) for a visiting delegation from USAID Moldova and Sida Agency. Additionally, several visits to the ZIPhouse were organized during the reporting period. The opportunities that ZIPhouse offers to students, young designers and professionals from light industry have been presented to James D. Pettit, US Ambassador to Moldova, Jonathan Katz, USAID Deputy Assistant Administrator and Thomas Rhodes, USAID Acting Country Director, during the official event on Launching the Partnership with SIDA of the ICT Excellence Center in Moldova project, hosted by ZIPhouse on October 19, 2015. A tour of ZIPhouse presenting the facility, the endowment, special software and electronic resources have been organized for USG representatives, as well as to Valeriu Strelet, Prime Minister, and other Government of Moldova and private sector representatives.

The project also organized a site visit to ZIPhouse for Alina L. Romanowski, the Coordinator for U.S. Assistance to Europe and Eurasia, on November 3, 2015. During her visit Ms. Romanowski met with the ZIPhouse and APIUS executive teams, beneficiaries of ZIPhouse and also 3 companies that benefited from USG assistance through CEED II Project. Veronica Pintilie, brand Creme Brule, Ana Popova, brand JuBijoux by Ana Popova and Viorel Benderschi, Zorile showcased with proud their products and mentioned the great impact of the USG assistance on improving product quality and design, enhancing productivity and opening access to new markets through participation at international trade shows.

B. Administration and Finance



SECTION V

LEVEL OF EFFORT (LOE)

The following table provides summary of the project LOE usage and expenditures during the quarter and year-to-date.

A. Level of Effort Report

LABOR CATEGORY	CONTRACT TOTAL (work days)	Y1Q1 LOE	YTD LOE	Remaining LOE
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

APPENDIX I

PERFORMANCE MONITORING PLAN: TARGET VS. ACTUAL

Indicator		Year 1 Targets	Actuals Y1Q1
Project Purpose: Grow and Expand Targeted Competitive Industries			
1	Value of domestic and export sales in targeted sectors	N/A	Data reported annually
2	Increased value of sales facilitated on behalf of assisted enterprises	\$20 mln	Data reported annually
3	Value of new private sector investment in assisted enterprises	\$8 mln	Data reported annually
Objective 1: Increased Productivity and Quality (Better Workforce and Adopted Innovation)			
IR 2.2: Improved Private Sector Competitiveness in Selected Industries			
Sub-IR 2.2.1: Increased Productivity			
4	Number of enterprises receiving assistance to improve knowledge, processes, technologies and practices	150	105
5	Assisted enterprises applying improved knowledge, processes, and technologies	60	19
6	Assisted enterprises following recognized product or process standards	10	1
7	Individuals receiving job skills aligned with industry needs	3,000	447
8	Percentage change in specified productivity measure (sales per employees)	+2%	Data reported annually
Objective 2. Expanded Market Linkages			
IR 2.2: Improved Private Sector Competitiveness in Selected Industries			
Sub-IR 2.2.2: Expanded Market Linkages			
9	Number of enterprises with sales facilitated through USG assistance	50	59

Indicator		Year 1 Targets	Actuals Y1Q1
IR 2.1: Improved Private Sector Competitiveness in Selected Industries			
Sub-IR 2.1.2: Expended Market Linkages			
10	Number of assisted enterprises in targeted industries with increased financing	20	Data reported annually
11	Financing accessed by assisted enterprises	\$600,000	Data reported annually
12	Number of assisted enterprises in targeted industries with increased investment	20	Data reported annually
Objective 3. Improved Sector –Enabling Environment and Increased Local Capacity			
IR 2.1: Improved Economic Foundation for Growth			
Sub-IR 2.1.1: Improved Business and Trade Enabling Environment			
13	Number of regulations and administrative procedures eliminated, streamlined or simplified with USG support	4	1
14	Number of Public-Private Partnerships established	5	0
15	Value of Public-Private Partnerships established	\$300,000	\$ 0
16	Improved capacity of local institutions	+10% over baseline	Data reported annually
17	Project-assisted public-private sector dialogue platforms conducted	4	1

APPENDIX II

PROJECT MEDIA COVERAGE IN OCTOBER – DECEMBER 2015

Title of media product	Media Outlet/link	Date/issue
USAID a lansat un nou proiect de asistență în Moldova, cu un buget de aproape 22 de mln \$	http://agora.md/stiri/13589/usaidd-a-lansat-un-nou-proiect-de-asistenta-in-moldova--cu-un-buget-de-aproape-22-de-mln-dolar	Oct 21, 2015
(video) Un nou proiect de asistență a Guvernului SUA pentru Moldova. Suma se ridică la 21 mln dolari	http://unimedia.info/stiri/video-un-nou-proiect-de-asistenta-a-guvernului-sua-pentru-moldova--suma-se-ridica-la-21-mln-dolari-103029.html	Oct 21, 2015
A fost lansat proiectul CE-WIN, succesorul proiectelor CEED și CEED II	http://mbc.md/rom/news/economy/a-fost-lansat-proiectul-ce-win-succesorul-proiectelor-ceed-i-ceed-ii/	Oct 22, 2015
Guvernul SUA oferă 22 de milioane de dolari Moldovei. Proiectul de Competitivitate al USAID a ajuns la a treia etapă	http://www.prime.md/rom/news/economic/item27356/	Oct 21, 2015
Business24.ro – Vinurile Moldovei ajung in Romania	http://www.business24.ro/companii/stiri-companii/vinurile-moldovei-ajung-in-romania-1565821	Nov 18, 2015
Femei in afaceri - Intre 20-22 noiembrie 2015, Vinul Moldovei se prezinta romanilor la cel mai mare targ international de vinuri: Good Wine, Editia a-XIV-a.	http://www.femei-in-afaceri.ro/ro/articol/intre_20_22_noiembrie_2015_vinul_moldovei_se_prezinta_romanilor_la_cel_mai_mare_targ_international_de_vinuri_good_wine_editia_a_xiv_a	Nov 18, 2015
Kudika.ro – Vinul Moldovei se prezinta romanilor la cel mai mare targ international de vinuri din Romania	http://www.kudika.ro/articol/news/42348/vinul-moldovei-se-prezinta-romanilor-la-cel-mai-mare-targ-international-de-vinuri-din-romania-good-wine-editia-a-xiv-a.html	Nov 18, 2015
Vinul.ro – Vinurile Moldovei, cu oferte în premieră și masterclass-uri la Good Wine	http://vinul.ro/vinurile-moldovei-cu-oferte-in-premiera-si-masterclass-uri-la-good-wine.html	Nov 18, 2015
cosmintudoran.ro – MASTERCLASS MOLDOVENESC	http://www.cosmintudoran.ro/2015/11/19/masterclass-moldovenesc/	Nov 19, 2015
Stilmasculin.ro – Vinul Moldovei se prezintă românilor la cel mai mare târg ynamicional de vinuri din Romania: Good Wine, Editia a-XIV-a	http://www.stilmasculin.ro/vinul-moldovei-se-prezinta-romanilor-la-cel-mai-mare-targ-international-de-vinuri-din-romania-good-wine-editia-a-xiv-a/	Nov 20, 2015
Ziare.com – Vinurile Moldovei ajung in Romania	http://www.ziare.com/afaceri/stiri-afaceri/vinurile-moldovei-ajung-in-romania-1394316	Nov 18, 2015
Eva.ro – Vinul Moldovei la Good Wine, Editia a-XIV-a	http://www.eva.ro/divertisment/stiri/vinul-moldovei-la-good-wine-editia-a-xiv-a-articol-89479.html	Nov 18, 2015
Cu suportul Proiectului de Competitivitate al USAID, Asociatia Micilor Producatori de Vinuri, reprezentata de vinurile Equinox, Et Cetera, Molda, Carpe Diem, DAC, Mezalimpe si MinisTerrios, a organizat doua master-classuri in care au fost prezentate vinurile "de autor" importatorilor, jurnalistilor si sommelierilor romani, in cadrul Targului International GoodWine, in Bucuresti, Romania.	https://www.facebook.com/USAIDMoldova/posts/1119087088102685	Nov 23, 2015
Women in fashion industry	http://www.allmoldova.com/ro/article/romana-inspirate-de-la-femeile-din-industria-modei-autohtone/	Nov 21, 2015
Business24.ro – Vinurile Moldovei ajung in Romania	http://www.business24.ro/companii/stiri-companii/vinurile-moldovei-ajung-in-romania-1565821	Nov 18, 2015
Ziare.com – Vinurile Moldovei ajung in Romania	http://www.ziare.com/afaceri/stiri-afaceri/vinurile-moldovei-ajung-in-romania-1394316	Nov 18, 2015
Eva.ro – Vinul Moldovei la Good Wine, Editia a-XIV-a	http://www.eva.ro/divertisment/stiri/vinul-moldovei-la-good-wine-editia-a-xiv-a-articol-89479.html	Nov 18, 2015
Femei in faaceri - Intre 20-22 noiembrie 2015, Vinul Moldovei se prezinta romanilor la cel mai mare targ international de vinuri: Good Wine, Editia a-XIV-a.	http://www.femei-in-afaceri.ro/ro/articol/intre_20_22_noiembrie_2015_vinul_moldovei_se_prezinta_romanilor_la_cel_mai_mare_targ_international_de_vinuri_good_wine_editia_a_xiv_a	Nov 18, 2015
Kudika.ro – Vinul Moldovei se prezinta romanilor la cel mai mare targ international de vinuri din Romania	http://www.kudika.ro/articol/news/42348/vinul-moldovei-se-prezinta-romanilor-la-cel-mai-mare-targ-international-de-vinuri-din-romania-good-wine-editia-a-xiv-a.html	Nov 18, 2015

Vinul.ro – Vinurile Moldovei, cu oferte în premieră și masterclass-uri la Good Wine	http://vinul.ro/vinurile-moldovei-cu-oferte-in-premiera-si-masterclass-uri-la-good-wine.html	Nov 19, 2015
cosmintudoran.ro – MASTERCLASS MOLDOVENESC	http://www.cosmintudoran.ro/2015/11/19/masterclass-moldovenesc/	Nov 19, 2015
Stilmasculin.ro – Vinul Moldovei se prezintă românilor la cel mai mare târg ynamiconal de vinuri din România: Good Wine, Editia a-XIV-a	http://www.stilmasculin.ro/vinul-moldovei-se-prezinta-romanilor-la-cel-mai-mare-targ-international-de-vinuri-din-romania-good-wine-editia-a-xiv-a/	Nov 20, 2015
GoowWine.ro – Vinul Moldovei se prezintă romanilor la cel mai mare targ international de vinuri din România: Good Wine, editia a XIV – a	http://www.goodwine.ro/files/comunicat_toamna_2015.pdf	Nov 20, 2015
Business-review.eu – GoodWine 14 th edition brings Guinness Book Moldovan Wines to aficionados	http://business-review.eu/featured/goodwine-14th-edition-brings-guinness-book-moldovan-wines-to-aficionados-92025	Nov 21, 2015
Diez.md - „Vinul Moldovei” – selecție inedită de peste 200 de vinuri, prezentată la București	http://diez.md/2015/11/23/vinul-moldovei-selecție-inedită-de-peste-200-de-vinuri-prezentată-la-bucurești/	Nov 23, 2015
Manager.ro – Vinul Moldovei a impresionat prin calitate europeana si marketing ynamic la expozitia "Good Wine 2015"	http://www.manager.ro/articole/comunicate/vinul-moldovei-a-impresionat-prin-calitate-europeana-si-marketing-dinamic-la-expozitia-good-wine-2015-83333.html	Nov 24, 2015
Webpr.ro – Vinul Moldovei a impresionat prin calitate europeana si marketing ynamic la expozitia Good Wine 2015	http://www.webpr.ro/stiri-evenimente-20618487-webpr-vinul-moldovei-impresionat-prin-calitate-europeana-marketing-dinamic-expozitia-good-wine-2015.htm	Nov 24, 2015
Hotnews.ro – Vinul Moldovei a impresionat prin calitate europeana si marketing ynamic la expozitia Good Wine 2015	http://m.hotnews.ro/stire/20618487	Nov 24, 2015
Business-review.eu – Good Wine 2015: Wine of Moldova introduces new benchmarks for quality and identity	http://business-review.eu/featured/good-wine-2015-wine-of-moldova-introduces-new-benchmarks-for-quality-and-identity-92250	Nov 24, 2015
Eva.ro - Vinul Moldovei a impresionat prin calitate europeana si marketing ynamic la expozitia Good Wine 2015	http://www.eva.ro/divertisment/stiri/vinul-moldovei-a-impresionat-prin-calitate-europeana-si-marketing-dinamic-la-expozitia-good-wine-2015-articol-89791.html	Nov 24, 2015
Kudika.ro – Vinul Moldovei a impresionat prin calitate europeana si marketing ynamic la expozitia Good Wine 2015	http://www.kudika.ro/articol/news/42439/vinul-moldovei-a-impresionat-prin-calitate-europeana-si-marketing-dinamic-la-expozitia-good-wine-2015.html	Nov 24, 2015
Stilmasculin.ro – Vinul Moldovei a impresionat la expoziția Good Wine 2015	http://www.stilmasculin.ro/vinul-moldovei-a-impresionat-la-expozitia-good-wine-2015/	Nov 24, 2015
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Vinul.ro - Noile vinuri ale Moldovei, tot mai prezente în România	http://vinul.ro/noile-vinuri-ale-moldovei-tot-mai-prezente-in-romania.html	Dec 3, 2015
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