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PROJECT

QUARTERLY REPORT

YEAR 1 QUARTER 2 (FY2016 Q2)

JANUARY 1 – MARCH 31, 2016



APRIL 14, 2016

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JANUARY 1 – MARCH 31, 2016

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FRONT COVER: Wine of Moldova country booth at Prowein 2016, March 13-15, 2016.
PHOTO CREDIT: Wine of Moldova

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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
CRM	Customer Relationship Management
DCFTA	Deep and Comprehensive Free Trade Agreement
DCOP	Deputy Chief of Party
DMC	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)
KPI	Key Performance Indicators
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
MIEPO	Moldova Investment and Export Promotion Organization
MODART	Modular Arrangements of Predetermined Time Standards
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
TCB	Tourism Country Brand
TOR	Terms of Reference
TOT	Training of Trainers
TR	Technical Regulation
ULIM	Free International University of Moldova
USP	Unique Selling Point
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 second quarter of the project, January 1 through March 31, 2016. Below is a summary of the highlights that occurred during the reporting period.

Wine & Tourism

- **Small winemakers got 10 medals at Berliner Wein Trophy and grow export potential for German market.** With USAID support, Association of Small Winemakers members participated at Berlin Wein Messe trade fair and Berliner Wein Trophy. Moldovan wines got remarkable results: 5 golden and 5 silver medals, out of 22 wine samples. The small wineries expect a 20% increase of their exports to Germany.
- **Wine of Moldova gets high profile and 2500 visitors at leading fair ProWein 2016.** 30 Moldovan leading wineries showcased at ProWein 2016 in Germany, the world's leading international wine fair. Over 2500 potential buyers and wine professionals visited the Wine of Moldova booth. Robert Joseph, reputed wine expert, moderated a master class with Moldovan wines for about 30 journalists and buyers. The wineries expect to raise exports following ProWein. Participation is a shared investment of National Office for Wine and Vine, wineries and USAID.
- **First Moldovan sommeliers get European Sommelier Diploma.** 14 Moldovan sommeliers passed the accreditation with European Sommelier Diploma (DSE), an European recognized qualification under the patronage of the European Parliament. The 5-day intensive course was organized by National Office of Vine and Wine and Moldova Sommelier School, with USAID support. The new sommeliers will promote international level standards within the Hospitality industry.
- **USAID is assisting the wine industry to develop a market intelligence platform.** The first market report, for Poland, is based on Euromonitor data and reveals that Moldovan wines have 4.5 % market share and could be further growing in quantity and price levels. The largest Moldovan market for bottled wines, Poland accounts for 4.6 mln bottles sold every year, or over 25% of bottled wine exports. In the coming months, market reports will be released for Czech Republic, Romania, and US, and shared in a new market intelligence platform of National Office for Wine and Vine.
- **Moldova wine, rural and “soft adventure” tourism showcased on German, Dutch and Romanian markets.** Moldova presented its tourism offer at leading travel expos in the key markets (determined jointly with the private sector and Government counterparts) - Vakantiebeurs in Utrecht, Netherlands, (January), Tourism Fair in Bucharest, Romania (February), and ITB in Berlin, Germany (March). Moldova was represented by operators that sell inbound tourism, Tatrabis, Amadeus, Solei, alongside with leading wineries with tourism facilities, such as Chateau Vartely, Asconi, Cricova. There is growing interest in the Moldovan tourism offer. Many existing partners actually extended tourist groups planned for 2016-2017, and new partners were identified interested to include Moldova in joint regional tours, e.g. with Romania. Based on feedback from prospective partners, Moldovan businesses will launch new products in 2016 focusing on soft adventure tourism, e.g. hiking and biking, wine and gastronomy tours.

Light Industry

- **Moldova’s Fashion Manufacturers get more high-value added orders, shifting from export of labor to product.** Several Moldovan apparel companies are breaking the ice on switching to high value-added manufacturing services for export markets. Participation in the 2016 edition of tradeshows (Premier Vision, Textilegprom and CPM) has generated \$2.7 mil worth of signed contracts for the 7 participating apparel companies, and over 100 leads. Over 90 percent of these contracts are for “full product” and “private label” manufacturing, which is adding more value compared to the traditional Cut and Make (or stitching) services. This shift from export of labor to product is uneasy for Moldovan manufacturers, who require new business skills. For instance, Ionel attracted a large order from a French client under full-product terms, which is the first such kind of experience for the manufacturer. To fulfil this order, Ionel is now seeking to secure textile suppliers, working capital and payment terms.
- **Hand-made textile accessories break ice to EU, US and Japan markets.** USAID helped hand-made jewelry manufacturers to exhibit at B2B trade fair Bijorhca 2016 in Paris. Participation exceeded expectations, breaking the ice for new markets. Real time feedback from Ju-Bijoux designer, Ana Popova, relates that the new buyers are from all around the world - United States, Japan, Spain. Marinelle and Maskvina came back home with trial orders from France, Italy, Belgium and Spain.
- **Moldovan shoes and leather accessories manufacturers showcased at the most prominent show Global Destination for Shoes and Accessories (GDS)** in Dusseldorf, Germany. Trade prospects include buyers from Europe, Asia and Africa. Moldova positioned as a source for reliable partners that are dedicated to deliver consistency in craftsmanship and design, European styling and exceptional value, from the heart of Moldovan people.
- **Din Inima Flagship shop opened on Chisinau main street, consolidating domestic market.** The new Din Inima boutique is launched through shared investment, of over \$50 K, of the leading Moldovan apparel brands Ionel, Georgette, Julia Allert, Premiera Donna and Sekana, in cooperation with Fashion Manufacturers Association APIUS and with support from USAID Competitiveness Project.
- **Moldovan designers get better sourcing skills.** 17 Moldovan fashion designers visited Texworld in France, the largest expo for raw materials, and 14 textile stock houses in the renown Prat region of Italy. Designers accessed quality fabrics and accessories for their future collections, leading to a better end product.

Information and Communications Technology

- **New robotics clubs in schools will help build technology skills and careers.** Eight new schools were able to start extra-curricular Robotics clubs after school hours. On January 12, during a ceremony organized together with the Ministry of Education, representatives of eight schools received 7 robotics kits each. The education robotics initiative is implemented by USAID, in partnership with the Ministry of Education, ICT Association (ATIC), StarNet and other partners. In total, 116 students from these institutions take robotics classes regularly. Educational Robotics is part of STEM Education modernization, and aims at building technology skills and careers.
- **13 teams from 10 schools competed at the second edition of FIRST® LEGO® League Moldova,** which took place on February 20. This robotics competition had

extensive media coverage, ensuring growing public interest toward Robotics and STEM in general. The Champion award winning team and the winner of the Robot Game Cup successfully competed at FIRST® LEGO® League Estonia on March 12-13, alongside 43 teams from 5 countries. To note that travel costs for Moldovan teams to Estonia were covered by private sector, Ministry of Education contributions and crowdfunding.

- **10 local IT companies will be supported in a German Market Entry Coaching Program.** USAID Competitiveness Project co-finances the participation of Moldovan IT companies in the program that will result with a certification for the German IT market, individualized marketing consultancy from BW Business Bridge IT marketing company, 2 years of on-going customized marketing support and personal introductions to potential German partners and clients.

Cross-Cutting Activities

- **Skills Gap Assessment for the vine and wine industry, apparel industry, tourism in Republic of Moldova was performed.** In general, the Skills Gap Assessment revealed that Moldova is unique in its "demographic collapse". At the same time the experts consider that "creating 25,000 decent jobs is a manageable challenge". Industries require from employees a deeper knowledge of new technologies and techniques, foreign technical languages, IT, procurement, negotiation, legal competences, budgeting and finance competences, logistics. More labor will be available if attractive jobs can be created in terms of better salaries, better working conditions, career growth perspective.
- **Strengthening business associations' advocacy capacity.** Competitiveness and BRITE Projects launched an initiative assisting 11 leading business associations to improve their advocacy capacity and ability to push the Government for reforms. These include AmCham, EBA, Chamber of Commerce, ATIC (ICT), APIUS (fashion manufacturing), ANTRIM (tourism), ASW/IGP associations (wine), Moldova- Fruct. USAID support will include training and coaching for capacity building of associations in advocacy (e.g. fact-based advocacy, communication and media engagement), and expertise for defining a business agenda critical for the sectors they are representing.
- **Comertbank and Prime Capital completed DCA loan placement, with \$3,9 mln worth of loans.** The final date for placing loans was March 31, 2016. Both institutions will continue to monitor these loans until maturity. The preliminary results show that Prime Capital has placed under DCA loans totaling \$1,029,170 or 87.74% of program limit. While for Comertbank the total cumulative utilization is estimated at \$2,800,000 or 49%, with exact data available end April.
- **New DCA opportunities are in SME lending and IT Park.** A market assessment DCA mission in March revealed that future opportunities would be in a multi-lender facility for MSMEs from various economic sectors, including agriculture, productive manufacturing, tradeable. Another opportunity is to facilitate lending (approx. 8-10 mln Euro) to the Starnet Group for construction of the Starnet IT Park in Chisinau, Moldova, which will help develop the Moldovan ICT ecosystem and spur job creation for ICT entrepreneurs and SMEs.

SECTION I

TECHNICAL ACTIVITIES DURING FY16 Q2

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 that covers the period from January 1 through March 31, 2016.

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 Performance Monitoring Plan (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 and support emergence of new small wine producers. The purpose of this activity is to increase the number of operating small wine makers that produce premium quality wines and promoting such boutique wine producers on local and international markets. Due to the limited information about potential wine producers, the Project partnered with Association of Small Winemakers (ASW) to implement "ASW Start-up Coaching program." The Project has contracted the local wine expert, Vitalie Babanuta to identify small emerging wine producers and perform a basic audit of their current capabilities. As a result, 19 new emerging winemakers and vine-growers were identified out of which 10 joined ASW membership to adhere to ASW membership standards. Out of these 10 wine producers, the Project identified 5 producers with high quality wine and a poetical for developing a sustainable winemaking and tourist business.

In order to assist the development of the above identified project, the Project has developed an assistance kit which will be partially implemented through SEED Fund, under an RFA that is planned to be issued the beginning of April, 2016.

During the upcoming period the Wine Expert along with Project technical team, and one mentor from ASW will perform field visit to identified wineries in order to elaborate tailored development plans. Following this activity, the ASW mentor will guide and coach the prospect new wine making, will provide assistance in development plan implementation, including accessing the allocated SEED Funding as well as will monitor the performance for at least 2 production seasons.

Improve wine industry workforce for a higher quality product. The aim of this activity is to improve the workforce skills and production capacities to the increasing demand of

business and international markets by changing the “low quality - high volumes” paradigm to a more sustainable “quality assurance” approach.

The Moldovan wine sector structure is quite heterogeneous. Besides the wineries that have already adapted to new global quality demands and standards, there is still a pool of wine producers that possess vineyards and production facilities allowing them to produce acceptable quality wines (that meet the criteria of Wine of Moldova quality standard), however, are still producing low to medium quality wines for bulk sales to CSI countries and sporadic exports to western markets. In order to increase the wine producing quality, the Project has initiated the “Product Quality Upgrade Program” (PQUP) implemented in collaboration of ONVV.

During the reporting period, the joint team of experts formed from Project’s team leading expert on business operations. Winemaking and winery engineering expert Mr. Vitalie Babanuta, ONVV’s winemaking expert Mrs. Elizaveta Breahna and vine growing expert Mr. Vladimr Corobca have performed field visits in order to audit 12 companies, prospect beneficiaries of PQUP support component. Based on performed audit the team has drafted a detailed report outlining the main viticulture and winemaking drawbacks and have proposed tailored improvements plans for each audited winery including assessments and recommendations for workforce development.

The conclusions of the above mentioned report will be presented to decision-making personnel of the audited wineries. As a result of this presentation, the Project will seek to obtain commitments from participating wineries of development and implementation of quality upgrading plans.

During the upcoming period, the Project plans to deploy the PQUP program partially by supporting equipment, technologies and processes investments through SEED Fund and participating wineries’ contributions as well as through direct technical assistance. All support is conditioned by mutual approval of tailored development plans.

Design Wine of Moldova Academy. The Wine of Moldova Academy is designed as a service to sector rendered by ONVV in order to cover the industry needs for continuous education and focused knowledge sharing, the concept paper on the curricula and functioning of the Academy will be based on cross-cutting skill gap analysis performed by subcontractor J.E. Austin experts.

During the reporting period under the skill-gap analysis activity, a team of experts from subcontractor J.E. Austin Mr. Karen Isahakyan and Mr. Kevin Murphy visited Moldova in order to assess the initial skill gap survey report and draft the outline of the report. One of the preliminary conclusion outlined by the experts also referred to the need of such an education facility for continuous education. The final report, which will be available by the end of April, will provide more detailed vision and concept of the curricula and proposal of institutionalization.

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

The European Investment Bank (EIB) Credit Line Filiera Vinului has indicated its intent to support the Chisinau College of Viticulture and Winemaking to establish a center of excellence at its Stauceni campus. The SEC is intended to offer best practices in technical education and training in viticulture and winemaking. Providing both initial and continuous education to the sector, the SEC will serve as a center for wine industry research and, potentially become an incubator for new businesses. Although the EIB will support the SEC financially, it does not plan to provide technical assistance. A concept for the SEC was

developed in 2015; however, the project has identified a need to complete and expand the initial concept paper to include more in-depth analysis of the operational and functional status of the SEC, its management model, and potential for financial sustainability.

During the reporting period the Project has reached an agreement with Ministry of Agriculture and Food Industry (MAFI) on the components of the future excellence center, particularly that the development shall not focus only on infrastructure but shall include the 'content' component (curricula adjustment, continuous education and professional formation, hospitality activities etc). Having this mutual understanding the Project decided to support the feasibility study, a team of local and international experts was identified, scopes developed and approved. During April the team will be contracted and work schedule developed, the feasibility study will be completed by the end of June and based on its result, the Project will decide upon further support and assistance for SEC development.

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

Implement digital wine traceability. In order to eliminate the labor-intensive paper based registers, which are mandatory for wineries to be held by current technical regulation, the Project has supported ONVV in implementing a software that is designed to eliminate the paper work and digitize the existing registers, by contracting an IT company to perform sector seminars, on-site installations and trainings as well as organize and provide a functioning help-desk.

During the reporting period the software was installed at 27 companies, 8 companies postponed the installation due to internal hardware or software incompatibility issues. Over 60 winery employees have received on-site trainings, during field visits.

Throughout March help desk was available to process and resolve any possible software issues; however, during this time, only 3 troubleshooting requests were processed which is sign of poor adoption rate of the software solution. A preliminary interview performed by the contracted company shows that even though the wineries and the end-users are fully conscious of the advantages the software provides they are still reluctant to perform the full transition from former paper based registers or their former excel based spreadsheets to a fully digitized solution. Based on this finding, the Project has decided to perform more in-depth research of the motives of non-acceptance as well as to collect feedback and improvements ideas for the next updates. The release of the updated version will constitute a motive to repeat the seminars during which the success stories and benefits will be highlighted. Also the updated version will be installed at the wineries.

Implementing IT solutions for vineyard management and product quality monitoring. In order to increase productivity and implement new business practices, improving wineries' performance through streamlining the processing of large amount of data collected during the production process, the Project researched for potential IT solutions for process management and product quality monitoring. Additionally, based on the cross-cutting initiative to bring IT to non-IT sectors, cross sectorial study has been conducted to analyze the need of software components. The study results revealed that an ideal solution for wineries would be a complex ERP solution, tailored to specifics of a winery. The solution would consist of several modules that can be deployed individually or in complex, depending on winery needs or adoption capacities. Two of such solutions were identified from international vendors Agreo Industry and Isagri. However, taking into consideration lessons learned from the previous activity, it was decided to revise the Projects' approach. The potential IT solutions will be advised and tested with a set of selected wineries that are more IT proficient and opened to innovation.

In the upcoming period, the expert will conduct interviews with a predefined pool of wineries to outline the main business processes that could be streamlined through an ERP solution, as well as will analyze the identified vendor's solutions for correspondence to them.

Support the development of an IT solution for random allocation of tasters for organoleptic analysis. To synchronize the current regulations with EU standards, ONVV with USAID support has developed new organoleptic assessment of wine products. During the reporting period an IT company was contracted to develop the software for random allocation of tasters, digitizing the sating sessions and keeping track records of tasting sessions. By the end of March, the design was developed and approved, the main processes described and documented, the main part of functional engine developed, including the record of the tasting sessions which is due to be issued to public testing during April. Moreover, as part of the process, the ONVV has announced the public contest for authorized tasters' selection, as a result 51 persons have applied from which, based on testing results, the final list of authorized tasters will be determined. The final version of the software, and the first organoleptic sessions, are scheduled by the end of April.

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

Develop wine tourism destinations. The USAID Competitiveness Project is supporting the development of the wine and tourism as a cluster, as such the wine tourism being the main product to be developed and promoted. During the reporting month, following the meetings with the tourism sector representatives when the approach was decided and areas for tourism development (Codru and Stefan Voda wine regions) were identified, the Project contracted a wine tourism specialist, Diana Isac, to evaluate the wine tourism products, facilities, soft skills of the guides and sommeliers, and make recommendations based on her findings. Diana Isac was considered the most appropriate candidate for this assignment as she is the Founder and CEO of the "Winerist" a wine tourism portal in UK, which is selling wine tours throughout the world and is familiar with the wine tourism situation in Moldova. Together with Diana Isac, the Project expert in Wine Tourism defined the final list of 20 wineries to be evaluated. While the evaluation has begun in the reporting period, the final reports and recommendations will be provided by the middle of April.

The Project is also supporting the *Blueprint for Wine Tourism Development* to be developed by end of May 2016. The Blueprint will be developed in several stages: (i) understanding the international context through participation at IWINETC 2016, (ii) strategic workshop in Moldova with industry stakeholders for developing the first draft Blueprint at end April, (iii) national consultation of draft Blueprint and final draft by end of May.

This activity is conducted in partnership with the European Investment Bank (EIB) Filiere du Vin Technical Assistance Project, and is in line with Activity 4. Upgraded Tourism Sector Policies and Reformed Regulatory Framework from Annual Work Plan of the Project. To assist the process of Wine Tourism Blueprint, jointly with EIB, the Project will support a delegation of Moldovan tourism key stakeholders consisting of ONVV, National Inbound Tourism Association of Moldova (ANTRIM), National Tourism Agency of Moldova (NTA), MIMI Winery, Asconi Winery, Chateau Vartely Winery, EtCetera Winery and Cricova Winery. The delegation will be led through the conference by the Wine expert Marco Tiggelman and Wine Tourism expert Jan Willem Richelmann. This is a great opportunity to enhance knowledge, grow in profession and get inspired for the creation of the sector's vision and positioning. The IWINETC talk programmer will offer cutting edge professional learning delivered by savvy international industry experts covering useful topics within the wine and culinary tourism industry for business. This is an important stage for Moldovan wine tourism as it will be followed by the development of the Blue Print for the sector and later supported by the grant's program for product development.

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 spent on vacations, as well as minimize the seasonality. During the reporting month, the local consultant, Svetlana Lazar, evaluated the current potential of the rural pensions and tourism attractions in the wine regions. As such, another 15-20 rural pensions and 10-15 local tourism facilities were identified and assessed in the targeted regions, Orheiul Vechi, Ivancea, Clisova noua, Ialoveni, Milestii Mici, Costesti, Anenii Noi, Causeni and Purcari. More than 120 people participated at the presentations, including those who own a rural pension, or want to start a rural business, artisans, representatives from the local authorities and others. As a next step, the project together with the expert, will analyze the recommendations given by the consultant to each visited entity, and depending on their needs and potential, several of them will be proposed to enroll to the project's coaching program and will be offered the project's assistance. Moreover, on February 16th, the project has launched the Grants program. 26 applications were received and in April the final beneficiaries will be selected.

Develop Orheiul Vechi tourism destination. The Project will continue to support Moldova's tourism industry, with priority rural tourism and wine growing zones Codru (center of Moldova) and Stefan Voda (Southeastern Moldova). Project support will focus on target markets to promote Moldova as a tourist destination, diversification of tourism products offered and improving related infrastructure and quality to position Moldova as an attractive tourist destination based on authenticity and traditions. The Orheiul Vechi is a cultural-natural reserve and archaeological complex, an open-air museum situated between the villages of Trebujeni and Butuceni, 60 km northeast of Chisinau, and one of the most visited tourism destinations in Moldova. Due to its importance from historical, cultural and tourism point of view, it will be one of the main objectives for inbound tourism. It is also located in Codru growing zone that is covered by the Project. The Ministry of Culture has subordinated public institutions museum, theater, concert, etc., through which promotes and implements the state policy in the field of culture and heritage. Movable and immovable heritage promotion is essential for the development of tourism in Moldova. In this respect, cultural-natural reserve "Old Orhei", created by Law no. 251 of 4 December 2009 under the Ministry of Culture is the objective of heritage tourism with the highest share in Moldova. In the years 2012-2013, the Ministry of Culture has developed the Strategy of development of culture "Culture 2020" approved by the Government in 2014, which sets the priorities in the development of culture, preservation and enhancement of the national cultural heritage tourism, including natural cultural reserve "Orhei". In line with the Strategy, in 2015, the Ministry of Culture developed and submitted the nomination dossier Orhei Archaeological Landscape World Heritage List of UNESCO; the decision is expected in 2017. In 2013, the Tourism Agency developed strategy for tourism development "Tourism 2020" which was adopted in 2014, establishes strategic goals of development with shared private sector inbound tourism, including the tourist area "Orhei".

Under the project's initiative, Ministry of Culture will create a working group consisting of representatives of the Ministry of Culture, Tourism Agency, Project for Competitiveness, Ministry of Regional Development, Ministry of Environment, City Hall, business associations, private economic agents and other donors in order to achieve successful activities and coordinate its work. The working group will draw up an action plan in terms of implementation and responsible parties.

The implementation of the proposed actions will help increase the diversity and quality of the tourism offer and the lived experiences of visitors and tourists in Moldova, will strengthen the common views with diversification of tourism services providers in the region and create a single platform for implementing public-private regional development actions and will increase

the visibility and attractiveness as a tourism destination in the target markets.

The Project will support the development of a joint project with the Ministry of Culture and Tourism Agency which will form the basis of a set of actions that will contribute to the region's development: drafting the landscaping and cultural protection zone with functional zoning; internal rules of land with cultural assets and localities under Reserve; development of Tourism Strategy for 2016-2025; develop and promote a new concept of placing road signs and indicators in the Reserve, including in Trebujeni, Butuceni and Morovaia villages, ensuring the protection of the landscape and objects of cultural and natural heritage; development and installation of information panels objects of cultural heritage of the Old Orheiul Reserve; improving the promotion as a tourist destination, such as the development of a web page and increasing online presence; develop promotional materials, a virtual tour guide and others; promote cultural activities (traditional festivals, folk music, classical music). Moreover, the Project will offer support to improve tourism services in the region through technical assistance and Grants Program for diversifying tourism products offered and improvement of facilities and quality crafts centers and rural pensions in the area.

Moreover, the parts will sign a memorandum of understanding in April to set up the objectives and will collaborate efficient, sustainable and equitable by pursuing the common goal to develop the Tourism site Orheiul Vechi as a tourism attraction of national significance and its integration into the tourism product.

During the reporting period, the first site visit took place with Vice-Ministry of Culture, Director of the Orheiul Vechi reservation, Butuceni Eco-Resort and the landscape designer, in order to analyze the possibilities to create an environmental and tourism friendly zones by the monastery, museum and other parts of the area. As a result, the Ministry provided all the available data about the flora and fauna of the region and the designer started to work on the landscape improvement. As a next step local international companies such as JTI, EFES and other donors will organize the Green Day at Orheiul Vechi.



Photo credit: Anatolie Botnaru

Photo caption: Study visit to Orheiul Vechi, on March 29, 2016 (from left to right: Anatolie Botnaru - Eco Resort Butuceni owner, USAID Moldova Competitiveness Project team - Natalia Curnic, Doina Nistor, Ana Railean, and Gheorgeh Postica Vice-Ministry of Culture)

Development of German and Polish roots. While wineries provide a “hook” for Moldova’s tourism industry, visitors must have more than wine tours on offer to make Moldova an attractive destination. Therefore, the Project will support the development or upgrading of tourism products, rural pensions, hiking and cycling routes around wineries, gastronomic and ethnographic tours, handicraft tours within the targeted wine tourism areas etc. In addition, the project will support the development of such tourism products as thematic routes according to the demand in target markets Poland and Germany, those being based on the historical roots. As such, in the reporting period, the Project has contracted the Guides, Lecturers and Translators Association, to development of a range of thematic tourism itineraries related to the ethnic communities living in Moldova. Taking into account that the strategy of the sector is to concentrate on the attraction of tourists from 3 main markets: Poland, Germany and Romania, the thematic itineraries focused on the role and importance of these communities in Moldova (in all the development periods) would add value to the country tourism offer, giving a personal reason for citizens of these countries to visit Moldova. Thematic itineraries focused on various ethnicities that live in Moldova is only one of the possibility to personalize and diversify the tourism offer of Moldova, the range and the potential of thematic tours being much greater. The association will develop two thematic tourism routes based on the Polish and German roots in Moldova, highlighting the importance of these two ethnic communities in the country. The development of each thematic route will include a deep and comprehensive research work in libraries, archives and field visits to identify 2 most attractive and convenient tourism routes based on Polish and German roots. After the research, the two tourist routes dossiers (tourist routes dossier includes informative supporting documents to be used further by tourism guides and tour operators in the promotion of the identified routes will be developed. Moreover, in order to increase interest in thematic Moldovan tourism offer, strategic and well-integrated PR and communication activities will be implemented later on. Activities will include international press events, familiarization tours for specialized press and bloggers, and dedicated publications in international tourism magazines and portals.

Upgrade the concept of the National Wine Day. National Wine day in Moldova is one of the biggest tourism events having more than 15K tourists participating annually. In order to increase its popularity and make it an international event, the project decided to support the development of a new concept and strategy for the next three years. The project had several meetings with wineries participating at National Wine day and the event’s organizers to brainstorm on this topic and is in the process of identifying an international consultant who will be able to develop the concept and the strategy.

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.

MICE tourism is the most rewarding type of tourism for the development of a certain destination. Not only does it have a good influence on the extension of the tourism season, which is – when it comes to destinations such as Moldova – perhaps the most important factor, but it also boosts the development of other tourism forms. MICE tourism destinations are in demand, and given its convenient location in Europe, Moldova has high potential in development the tourism direction. There are only a few Destination Management Companies (DMC) that provide MICE services in Moldova for foreign companies.



Photo credit: Natalia Curnic

Photo caption: Moldovan representatives together with Harold Fine during the workshops for the Moldovan MICE tourism roadmap development, February 22-24, 2016

Text Box 1. Testimonial on MICE Tourism

"I consider that Moldova officials should put more emphasis on this industry and show greater openness for it. I think if the authorities are really interested in developing tourism in Moldova, in my opinion, should be established a Ministry of Tourism. This will create an atmosphere both at home and abroad. MICE tourism is closely linked to the level of economic activity, that is why the Government should be interested to attract investment and international companies"

*Harold Fine,
MICE Tourism Expert*

The Project supports this new and important tourism direction. The MICE expert from UK, Harold Fine visited Moldova during February 22-24, 2016 to conduct a three-day workshop for the local DMCs - Solei Turism, Amadeus Travel, MoldovaTur and TatraBis; event management companies such as AQA Logistics, Berlizzo Events, Summit Events, Parc Communications; hotels Jazz, Jolly Alon and Radisson Blu; conventions centers, and wineries Et Cetera, Asconi, Chateau Vartely. As a result of this workshop, the draft MICE tourism roadmap has been developed. As such MICE product profile, including unique selling proposition, positioning, differentiating elements, key competitiveness advantages, main segmentation of the Moldovan MICE product offer, were discussed and vetted with the sector stakeholders. The roadmap will be finalized in April and ANTRIM will undertake the necessary actions to implement the action plan for promotion and marketing MICE product for 2016-2018.

The MICE expert also recommended the creation of the Moldova Convention Bureau which will be the official representative of MICE and promote Moldova as a MICE destination on international marketplace.

In addition, Mr. Harold Fine will accompany the Moldovan delegation to the IMEX Expo on April 19-22, which will be organized with ANTRIM, NTA and the Project's support. Moldova will also participate at the IMEX Political Forum on April 19th, 2016.

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. Skills gap assessment was launched for Wine and Tourist sector

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.

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.

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. Since its launch the national wine country brand has consumed its novelty potential and needs an update in terms of communication rationale, visual components and reevaluated Unique Selling Points (USPs). For this purpose, the Project initiated the development of an internationally targeted PR & Communication action plan. The Project has invited internationally renowned wine expert, writer and wine evangelist – Mr. Robert Joseph, to lead this activity, following his implications in ONVV activities at ProWein and his business visit during December 2015. The scope of work for Mr. Joseph is developed and is pending for approval by ONVV. During April, Mr. Joseph will be contracted and the plan is expected to be drafted and approved by the end of May 2016.

Improve Wine of Moldova online presence and social media communication. Since its launch in 2013, the Wine of Moldova website, which initially was conceptualized as a landing page or e-visit card, has consumed its relevance and needs to be upgraded to a fully functional web portal, containing full set of information needed for inquiries including those from international markets. For this purpose, the Project has supported the ONVV by hiring a journalist and wine blogger – Mr. Andrei Cibotaru, who has developed a full set of written content needed for the new web portal according to previously developed prototype. However, the implementation of the rendered deliverables was postponed due to difficulties with public acquisition procedure for website development services. It is planned that by the end of May 2016 the first beta version of the website will be available online.

Support the adoption and implementation of the Wine of Moldova utilization rules and the international IP legal protection. Wine of Moldova represents the national country brand as well as a quality mark for wines that comply with technical regulation. As Moldavian wine sector is export driven, it is crucial for the national wine country brand to obtain international intellectual property rights protection. For this purpose, the Project has assisted ONVV in development of the WoM draft regulation which is pending for approval by RM Government.

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 national wine country brand Wine of Moldova. A legend alive remains the main leverage used by wineries to develop the current and explore new markets. For this purpose, the Project decided to enhance the presence of Wine of Moldova at the most important business exhibition for the wine industry, ProWein, held annually in Dusseldorf, Germany.

Therefore, the Project supported ONVV by cost-sharing the space rent costs and provided assistance to ONVV marketing team in developing and implementing a PR& Communication plan that included: a web banner campaign tunneling to a dedicated Facebook event; a direct e-mail campaign using the “Best Wine importers” database; a post PR Campaign with assured publications in international wine press and dedicated magazines on target markets; a PR campaign on local market with direct reporting from the trade fair; on ground and OOH advertising near the exhibition center.



The results of the exhibitions were unprecedented for the 30 participating wineries out of which 5 members were from ASW. More than 2500 people guests participated during the exhibition, and during the opening, a contract was signed by one of participating wineries right at the booth

The master class held by Robert Joseph, having as a guest speaker Caroline Gilby MW, has gathered more than 30 attendants, which were presented a selection of top Moldovan wines, 4 of which were form the members of Association of small winemakers. The master class was opened by H.E. Ambassador of Republic of Moldova in Germany – Mr. Oleg Serebrian.

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 Wine of Moldova (WoM) at international wine competitions. During February, the Project supported ASW Members to submit entries to Berliner Wein Trophy. Germany is one of the key markets for the ASW members constantly seeking exporting quantities and reliable business partners. The project supported the participation of 22 wines of the small wine producers to the Berliner Wein Trophy, out of which 10 wines have achieved remarkable results, being awarded with—golden and silver medals.

Text Box 2. Medal Award for Moldovan wines, the Berliner Wein Trophy

Golden medals were awarded to:

- Carpe Diem Cabernet Sauvignon 2013
- Equinox Merlot 2011
- Gogu Winery Blanc de Merlot 2015
- Equinox Echinocytus 2012
- Equinox Rara Neagra 2014

Silvers medals were awarded to:

- Carpe Diem Feteasca Regală 2015
- Minis Terrios Pinot Noir 2014
- Vinăria Nobilă Feteasca Neagră 2013
- Equinox 5 elemente roșu 2013
- Asconi Sol Negru Chardonnay 2012

Additionally, during February, the Project decided to support the participation of the best Moldovan wines at 7 most renowned international contests. The producers were invited to cost-share participation fee for an equal amount of wine samples challenging them to increase the number of submitted samples, and thus, to increase the chance for medals and a higher visibility of Moldovan wines. In result of this call, 45 samples were submitted to the international

Text Box 3. Testimonial on the participation at the Prowein tourism exhibition

“... Russia did the biggest favor for Moldova by introducing the embargo back in 2006. In the last 10 years I have witnessed a genuine quality revolution in quality”

Robert Joseph, International wine expert

competitions, out of which 16 wines are submitted to Decanter World Wine Awards; 16 samples are registered in the ‘Concours Mondial de Bruxelles’; 9 entries have been registered in International Wine Challenge; and 4 entries applied to International Wine and Spirits Competition. The call for registration to Decanter Asia, Mundus Vini and Challenge international du Vin is still opened. The results from the submitted entries, will be available at the end of May - beginning of June.

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

Support new generation wineries to develop market penetration strategies. The challenge of this activity is to increase presence of new wine exporters on the EU markets, especially on target export markets such as: Poland, Czech Republic and Romania, through coaching and support by customized and tailored approach to each tier of exporters: ASW boutique, author wines; new generation wineries; and export champions.

During the reporting period the project has initiated the projects on all 3 tiers:

- ASW - paper on common marketing vision and promotion plan (including definition of target markets developed and is pending for endorsement by ASW Board, based on the developed plan the ASW are eligible for direct support for promotion plan implementations through SEED Fund.
- New generation wineries – on this tier, it is planned to implement a coaching program on Polish market, in this purpose an expert with extensive expertise and knowledge in wine importing and distribution was identified. During April the project will perform a survey within the pool of program participants to assess their knowledge, plans and resources which will allow to tailor the SoW for expert – coach and ToR for coaching program.

- Export champions – the Project has contacted the wineries that generate the majority share of exports on target markets in order to assess their individual promotion plans and evaluate the possibility of enhancing them. Based on received information the Project will decide upon the interventions and support for each individual activity.

Deploy ECP support and coaching the development of new export markets. As a part of the ongoing ASW support, Project covered the participation costs of 5 ASW members that have active contracts with German importers and distributors to participate at the Wein Messe Berlin. The 2016 edition of this trade fair had an astounding success being visited by 50.000 visitors. During the fair the ASW's German partner has collected over 550 bottles in direct shipping orders at an average 'shelf-price' of 10 euro. Based on this market section, the ASW importers will organized a batched shipping lot.



Photo credit: Ilie Gogu

Photo caption: Ilie Gogu – Gogu Winery and Ion Luca – Carpe Diem, presenting wines to visitors at the Wein Messe Berlin during February 26-28, 2016

The ASW members have also asked the Project to support participation in spring edition of Good Wine trade fair which will take place in Bucharest during 15-17, April, 2016. The project agreed to offer the support in rent payment conditioned by a 40% contribution from participating ASW members which will be used for stand branding and PR activities around the trade fair.

Assisting Moldovan wine exporters to generate more sales on the EU markets.

During the reporting period, the Project assisted ONVV in developing and passing through the Coordination Committee of the annual marketing plans that include promotional activities on target markets. Also, the Project conducted a meeting with 'export champions' and ONVV, at which a preliminary approach and an action plan for promotional activities for Poland were drafted. The wineries had an opportunity to coordinate their marketing activities with their business partners including business meeting during Prowein. They have received positive feedback and implementations commitments from Polish importers and distributors. Action plan with Polish counterparts will be developed by exporting wineries in April.

Support the development of new wine products adapted to export markets. The aim of this activity is to support individual wineries for adapting their product to specifics of the wine

markets, including developing specific product segments, branding, wine labels, etc. During the reporting period the Project has discussed with F'utor and Asconi wineries, upon their request, the prospect projects for labels adaptation. Upon the receipt of promotion plans for assisted projects and allocated budgets the project will decide on the amount of support to be provided.

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

Perform local 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. In this purpose a research&marketing company – Magenta Consulting was contracted after an open competition at the end of 2015. During the reporting period Magenta Consulting has collected the data form secondary sources (BNS, MAFI and Customs), drafted and approved the questionnaire, as well as developed and approved with ONVV and the Project a sample report on imaginative data. In the upcoming period primary data, from field surveys, will be collected, and by the end of May the report on market research ready. The final deliverables will be presented to the sector with the assembly on Marketing Committee platform, and then disseminated to general public via press.

Promote wine culture through “Wine Friendly” program. In order to capitalize on success of the first wave of ‘Wine Friendly’ program, the Project supported ONVV in organizing the second round of accreditations, events and communications aimed to promote the bottled wine consumption in HoReCa segment. During February, 10 new “Wine friendly” outlets were accredited and 12 master classes organized. The project also managed to extend the list of participating wineries to up to 15 companies.



Photo credit: Eugen Motasov

Photo caption: Minister of Agriculture and Food Processing Industry, Eduard Grama holding a speech during his attendance at master-class within ‘Wine Friendly’ program at Nobil English Cigars Club, February 25, 2016

The promotional campaign included partnership with 4 media portals which generated over 50 media hits; 6 infomercials were uploaded to Wine of Moldova youtube channel featuring winemakers, restaurant owners and opinion leaders were produced and placed on social media generating over 1200 views. A special program for bloggers was also implemented, 10 bloggers were accredited as the official bloggers of Wine Friendly program and received the status of the co-host at the master classes, the cooperation with bloggers generated 21 blog post reaching the overall estimated viewership of 10 000 of impressions.

The social media campaign generated an unprecedented interaction, 1448 interactions (likes, comments, shares) were generated by 1600 + individual users. The campaign resulted also in a 500+ reach over facebook audience which represents a five-time increase in comparison to wave 1 of the campaign. All of this brought 501 new page followers to WoM facebook page.

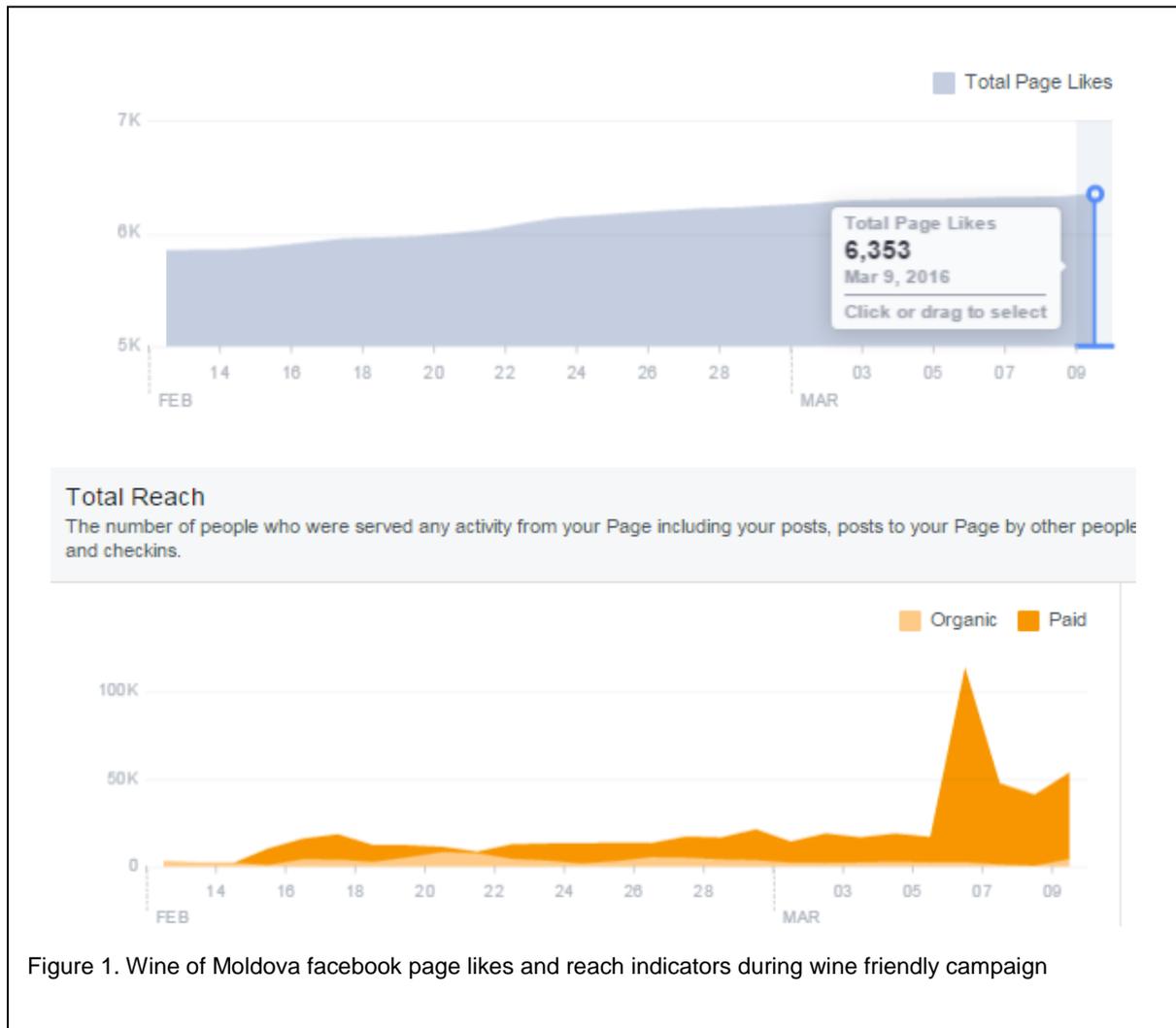


Figure 1. Wine of Moldova facebook page likes and reach indicators during wine friendly campaign

As part the ongoing effort to promote wine culture in Moldova, the Project assisted the School of Sommeliers of Moldova in organizing training courses for European Sommeliers Diploma (DSE), as well as organized jointly with ONVV a series of trainings and accreditations of the restaurants in the second wave of Wine Friendly Program.

These events were implemented with assistance from 2 wine and food experts from France, Maitre Sommelier, Brigitte Leloup, and Maître cuisinier, Alain Leloup, the program including:

- Formation courses and exams for DSE diploma for 14 sommeliers that received the internationally recognized accreditation from European association of sommeliers.
- Accreditations and trainings for Wine Friendly restaurants (February 11-19, 2016): Ms. Leloup visited 11 restaurants to perform the overall service assessment, and provided basic trainings on wine serving.
- Master Class for operating sommeliers (February 12, 2016): Mrs. Leloup led a refreshment master class for individuals that hold the sommelier title and operate in HoReCa segment.
- Master Class for Chefs (February 12). Held by Mr. Leloup for the chefs of restaurants accredited under the first wave of Wine Friendly program “On how to cook with wine.”



Photo credit: Andrei Solonari
Photo caption: Chef Alain Leloup, cooking ‘Gambas on wine’ during the master class for restaurants’ chefs



Photo credit: Alexei Burciu
Photo caption: Maitre Sommelier Mrs Brigitte Leloup demonstrating the decantation technique during the Wine serving Master class at Paprika Wine Pub



Photo credit: Andrei Solonari
Photo caption: European sommelier class 2016. Group picture: 14 ASE Sommeliers, Mr. Tomas Rhodes, Mr. Dumitru Munteanu, Maitre Sommelier Brigitte Leloup and ASE ambassador in Republic of Moldova – Mr. Mihai Druta

**Text Box 3.
Testimonial on DSE
formation course**

“I can decisively affirm that the overall knowledge and skills levels of the candidates for the DSE diploma has increased in comparison to past years, and proof to it is the 100% success at the exams of all 14 candidates”

*Brigitte Leloup,
Maitre Sommelier,
Vice president of the
European Association
of Sommeliers*

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 foster business partnerships for Moldovan tourism industry. Based on the discussions with the tourism stakeholders, a preliminary promotion plan for 2016 has been defined. As such, during January 12-17, 2016 Tatrabis and Amadeus Travel tour operators along with Cricova and MIMI wineries, participated at the Vakantiebeurs exhibition in Netherlands. This is one of the biggest specialized events in the world, and it was the second time when the Moldovan tourism service providers participated under the tourism country brand “Tree of Life,” being supported this time by the USAID Moldova Competitiveness Project, ANTRIM and Moldovan Embassy in Netherlands.

Moreover, in order to make the participation at the exhibition more visible, two presentations with wine tastings took place at the stand: for mass media and partners to increase interest in wine tours in Moldova. As such, Amadeus Travel held negotiations on cooperation and exchanged contact details and information with travel agencies from Holland and Belgium, especially with those who work with Romania and Russia but do not have a partner in Moldova; held meetings with existing Amadeus Travel partners on programs and groups for 2016; discussed the possibility on organizing Fam-tours for some operators while two of them are ready to visit Moldova during the upcoming season.



Photo credit: Andrei Rusu

Photo caption: Vakantiebeurs Exhibition visitors at the Moldovan Stand, January 12-17, 2016

An extended program of meeting with 6 agencies were undertaken: Djoser - discussed feedback for 2015, discussed improvements of promotion Moldova online through Facebook and Twitter), there is interest in the Hiking Tours; Blini Reizen - plans to continue publication on the website of our program to Moldova, as well as to develop a new tour Fly & Drive; Sovjet Reizen - discussed the details of the first group in September 2016, as well as opportunities to stimulate sales for other departure dates, scheduled to launch a new trip Fly & Drive; Eurocult - Lito - negotiated feedbacks for 2015, and tours for individuals for 2016; Treinreiswinkel - suggested itinerary for a group of 22 people in March 2016; SRC Reizen - showed interest in organizing tours to Moldova in 2017, published for the first time Belarus tours for 2016 and discussed the possibility of publishing tours to Moldova as well; held meetings with other 6 tourism companies to discuss tours to Moldova for 2016-2017: Mevo Reizen, Drie Tour, Davidsfonds, Tiar Tours, Aktiva Tours, RUSTOUR.

As such, during February 25-28, National Tourism Agency in partnership with ANTRIM and USAID support, along with Tatrabis, Solei Turism, BT Travel, Cricova, Asconi and Chateau Vartely wineries Moldova was presented as the number.1 wine destination at the Tourism Fair in Bucharest, Romania. There is growing interest in the Moldovan tourism offer from the neighboring countries, especially in wine tourism. It was the first time when the Moldovan tourism service providers and wineries participated under the tourism country brand "Tree of Life", being supported this time by the USAID Competitiveness Project. Moreover, in order to make the participation at the exhibition more visible, three presentations with wine tastings took place at the stand: for mass media and partners to increase interest in wine tours in Moldova.

On February 27, 2016, ANTRIM held a presentation called "Moldova -wine tourism destination", where over 45 partner travel agencies, tour operators, local tour guides, representatives of tourism associations in Romania, bloggers and media representatives get acknowledged with Moldovan wine tours. The presentation was concluded with a tasting of Moldovan wines. The same day, the ANTRIM's director held another presentation at the Romania's stand, where around 150 people had the opportunity to learn about Moldova and its potential in wine tourism, about offers prepared by ANTRIM's members, as well as other travel possibilities including MICE tourism. During the event, ANTRIM's director held a series of meetings with representatives of tourism companies in Romania, potential partners such as Travis Company, InfoTravelRomania, Tramptravel, Majestic Jupiter, Phoenicia Hotels, Invitation Romania Travel, Popova Kula winery, Macedonia, Slanic Moldova as well as media representative and bloggers from Time Travel, calatoriaperfecta.ro, Travel Mix, imperatortravel.ro and Home Country Magazine.

Text Box 4. Testimonial on the participation at the Tourism Fair in Romania

"Official statistics for 2015 shows, an increase in inbound tourism by 8 %. From 15 500 foreign tourists and excursionists who have visited Moldova, 20.5% were from Romania. Lack of language barrier and cultural differences, more recently, the opportunity to come to Moldova only with ID card are the advantages that create a favorable environment to increase the number of Romanian tourists, but also to create more joint tours Moldova-Romania. "

*Emilian Dzugas
ANTRIM President*



Photo credit: Andrei Rusu

Photo caption: Moldovan representatives together with Romanian visitors at the Moldovan Stand at the Tourism Fair in Romania. February 25-28. 2016

During March 9-13, 2016 in Berlin took place the 50th edition of ITB Berlin Tourism exhibition - the biggest and the most important specialized B2B event in the target markets with 180 thousand visitors. The Project offered strategic support to the Tourism National Authority and ANTRIM to co-organize the participation at the highest level. The participating companies TatraBis, Amadeus Travel, Moldova Tur, BT Travel, Ways Travel, Solei Turism, Air Moldova, Berd's Design Hotel and Asconi Winery, had the great opportunity to meet with potential partners and customers. As the main tourism product is the wine, the general promotion was focused on Wine tourism. During the exhibit, Moldova's wine tourism has been presented to partners interested in Moldova, followed by wine tastings. Moldova -Tur Agency have initiated collaboration with two tour operators from Germany, initiated collaboration with online distribution systems of tours, shared contacts with a number of foreign tourist agencies, informed on the possibility of organizing a press-trip (with ANTRIM support) and the organization for FIT of a tour to Moldova (around 70 people).

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, partnerships, to extend the existing tours as well as develop and launch new products. The Competitiveness Project will co-finance the visit of the tour operators from target markets for the biggest tour- operators as a result of participation at international exhibitions including Travel Bidder 2015 in Poland supported by USAID. Ten foreign tour operators are willing to visit Moldova in individual familiarization trips, namely Lumian Ky, Go Barefoot, Biblische-reisen, Asteria Expeditions, Redo Travel & Incentive, Grupa Trip, Discovery Travel, Noble Caledonia, VTB Reizen TUI, World Theme Travel Company. Some companies sell Moldova only to individuals and all are considering to start selling Moldova as tourism destination for groups, some of them have never sell Moldova and this visit will be the final stage to commence business collaboration with Moldovan partners for touristic services. The participants will be guided through an intensive but interesting program that will feature Moldovan wines, cultural heritage, ethnographic values, and will experience the new products developed by the local tour operators. The intended outcome is for the foreign operator to begin booking tours to Moldova and for travel writers to write about Moldova as a tourism destination.

Develop the domestic tourism market. As the internal tourism remains to be a big issue while the demand is increasing, to grow the interest towards the tourism attractions in Moldova, the project has conceptualized a program to support during 2016 a series of tourism events. During March 1st- 31st, took place the application phase within the Program "Tree of Life" which aims to support cultural -tourism events. This program intent to put in value the traditions, to promote local cultural and artistic events and to position the Republic of Moldova as a tourism destination locally, regionally and internationally by increasing the visibility of local events that aim to develop the existing tourism potential. These should take place during April 1st 2016-April 1st 2017. Within this program were entitled to apply non-governmental organizations legally registered in Moldova, whose activities correspond with the objectives outlined above and have relevant experience in the organization and promotion of events and local authorities aiming to promote local events. As a result, 102 applications were registered, while 10 events will be selected to receive during support and consulting on demand, in order to increase the visibility of the event, cultural tourism and expanding their regional and international level through promotion and awareness.

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 (TCB). Though the TCB was 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 TCB expert Mr. Boico to provide support to the National Tourism Agency (NTA) and ANTRIM. He will assist with developing a generic communication strategy for the TCB, 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 April 2016.

Enhanced online presence on the Moldovan tourism destinations and products. The existing www.moldova.travel website and Moldova Holiday smart phone application 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, the project provided communications and website development support via 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 assists the MAFI, ONVV, and private sector associations by ensuring that legal regulatory reforms are enforced. The Project is involved in supporting organizations to implement the new technical regulations into subordinated normative acts as well as monitors these new regulations for local implementers via local consultants.

During the reporting period 2 important normative acts were developed by ONVV and introduced via Government and MAIA decisions:

- Government decision No. 282 form March 11, 2016 – “Technical concept of the automatic informational system – “Vine and Wine Register,” with is an integral part of Wine & Vine Register implementation activity supported by USAID.
- MAFI decree No. 20 form February 5, 2016 – regarding the list of admitted vine varieties for multiplication by ordinary material.

Support the development of a new wine sector strategy. Over the last five 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. Therefore, during the reporting period, the Project has extensively examined the current and past initiatives of ONVV, MAFI and other sector stakeholders in order to assess the achieved results and conceptualize its approach and intervention method. As a result, 2 initiatives were identified: National Program for Promotion of Food and Agricultural Products which is being developed with FAO support for MAFI having a section dedicated to wine promotion strategy, and the National Strategy for Agriculture and Rural Development for 2014 – 2020 having a separate compartment for “viticulture and wine industry”. The project will conduct meeting with FAO and MAFI in order to discuss and agree on the approach, envisage policy and overall strategy, and depending on the result determine its intervention and support.

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

The implementation of this activity is planned to start in the following quarter and depends on the MAFI and State Inspectorate for Controls over the Wine and Alcoholic Products (ISSPA) action plans.

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

Small and medium-sized winemakers have difficulties accessing financial services including the specialized assistance fund such as EIB's "Filiara Vinului" due to economic instability, fluctuation of exchange rates and absence of resources for risk guarantee. Starting with Quarter 3 2016, the project will provide support to local winemakers to develop business plans and feasibility studies.

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

Legal regulatory improvements of the tourism normative framework. In order to stimulate the tourism development modernization and reform policies, regulatory framework and business environment improvements are critical. As a service sector, tourism contributes to economic development by capital accumulation through approximately 12 types of industry-specific activities, with connections to about 20 related areas and around 140 tourism-related services: public food serving facilities; transportation; manufacturing and sale of commodities, equipment, souvenirs; cultural, sport and leisure activities; medical care services, etc. Institutionally, the sector is managed and coordinated by two types of entities: public and private. Tourism Agency is the specialized central administrative authority subordinated to the government, which has the mission to develop and promote the state policy in the field of tourism and enhance its competitiveness, both nationally and internationally. This employs 22 staff members and has 2 subordinated institutions: The National Centre for Staff Training in Tourism and the JSC "Jolly Alon". The Tourism Agency is also in charge of controlling the tourism activity and classifying the accommodation facilities; however, its controlling mechanism is faulty. The Licensing Chamber subordinated to the Ministry of Economy is in charge of licensing the tourism activity. The State Tax Service, subordinated to the Ministry of Finance, is in charge of controlling the activity of economic entities, including in the tourism sector. At regional level, the sector is represented sometimes by a specialist in the Cultural Divisions or the Economic Divisions of the local public authority councils.

At a private level, the sector is represented by the economic entities and the industry associations.

The tourism private sector has not addressed the above-mentioned regulatory problems and has repeatedly invoked many regulatory constraints of the tourism legal framework. It also has not developed a common list of issues. Consequently, it is necessary to work with the tourism private sector stakeholders in order to identify, explain and assess the legal constraints and regulatory barriers to their businesses, which will be benchmarked with the foreign best practices and solution option will be proposed aiming to exclude the regulatory barriers and to establish a sustainable development legal framework for the tourism industry.

Considering above, the tourism industry critically needs an upgrade of its legal framework to be in line with the foreign best practices. Public-private dialogue on the amendment of the

tourism legal framework is unbalanced, due to the weak capacity of the private sector to formulate proposals and regulatory initiatives, the project considers important to conduct a comprehensive analysis of the current tourism legal framework in order to identify legal regulatory issues, barriers and constraints to the development of a modern and dynamic tourism industry, which will become the 'Tourism Industry Legal Regulatory White paper'.

Therefore, in partnership with the BRITE Project, the Competitiveness Project engaged a local legal expert, Ina Butucel, to carry out a comprehensive analysis of the current tourism legal framework in order to identify legal regulatory issues, barriers and constraints to the development of a modern and dynamic Moldovan tourism industry, which will become the 'Tourism Industry Legal Regulatory White paper'. In consequence, the white paper shall become a legal regulatory agenda for the private tourism sector, to be lobbied and advocated by the sector association. During the reporting period, the consultant initiated the assessment and conducted several meetings with the stakeholders.

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. 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. Mrs. Gospodarenco has completed her assignment which included assistance of ONVV in assessing the gaps and inefficiencies of the staff and internal procedures, developing guidelines, recommendations and business processes to enhance the ONVV communication potential.

Mrs. Gospodarenco assisted to develop a specialized newsletters' service, which already had been released 3 times. Additionally, Mrs. Gospodarenco upgraded the institutional communication tools, such as presentations, institutional briefers, press releases templates, etc.

Within her assignment the consultant organized 2 major events: presentation of annual activity plan at the wine sector General Assembly and presentation of the Euromonitor studies results as well as several press conferences and press briefings. In order to ensure the continuation of introduced practices and processes Mrs. Gospodarenco coached ONVV PR Specialist, Ms. Valentina Rusu, thus ensuring the continuity after her exit. Moreover, the consultant has developed an integrated communication manual which was introduced as mandatory procedure by an internal order (decree) No. 07 from 17 March 2016.

As a result of activities performed by the consultant, stakeholders changed their perception about ONVV and consider it as a main expertise in local wine industry and view it as a valuable asset in achieving common goals.

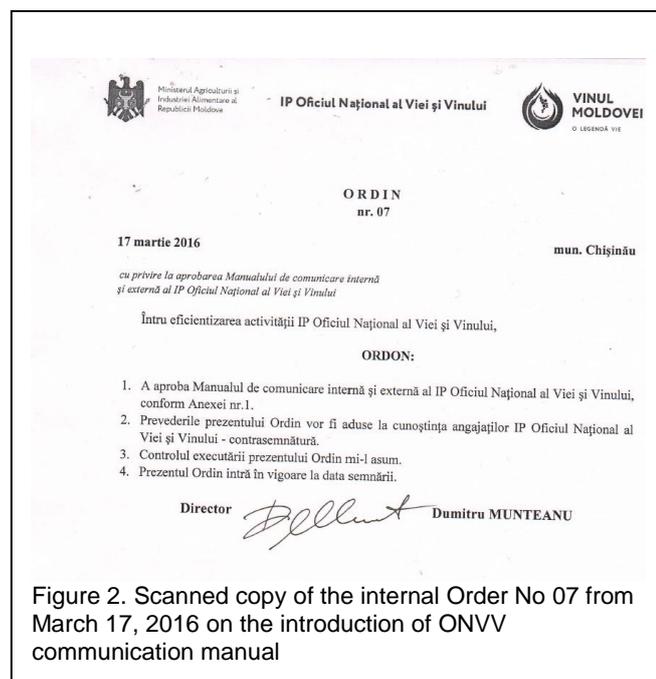


Figure 2. Scanned copy of the internal Order No 07 from March 17, 2016 on the introduction of ONVV communication manual

Assist ONVV in developing and providing marketing and business intelligence services to the wine industry. In order to provide target export market knowledge, data and insight, the project has assisted ONVV in developing the marketing intelligence services by contracting a local expert Mr. Stanislav Madan. During the reporting period Mr. Madan has drafted summary report on 5 key export markets based on Euromonitor data: Poland, Czech Republic, Romania, U.S. and China. Results of the report were presented at the assembly held on Marketing Committee platform. These reports were highly appreciated by sector and their publication was widely published through press.

Additionally, Mr. Madan developed an internal market overview on Quarters 1-3 2015, and a wine press review for Quarter 1 2016, which were included in ONVV newsletter. Given the achieved outcome, and the interest from the sector in receiving market data updates as well as report on other export markets, the Project has developed a plan for marketing and business intelligence services aimed at institutionalizing the processes and handing over the executors from the Project to ONVV. The plan will be implemented the beginning of Quarter 2 2016.

Support developing and strengthening the 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. The PGI wine associations need support in organizing their internal controlling procedures and to develop services for their members. During the reporting period, the Project has asked ONVV PGI specialist, Mrs. Diana Rotari, to assess the drawbacks and the problems in PGI Associations functioning and propose solutions to ensure sustainable development of those. Among proposed solutions were: elaboration of a long term development plan; contributing in formation of executive bodies that will be responsible for the development plan implementation; preparation of documentation and projects for application to SEED fund. 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 Moldova Competitiveness Project aims to 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, in February, the Project have launched the Grant's Program for sectorial associations. Together with the Project's technical team and the association members, the Executive Director has submitted the Application for grant. This is focused on the Promotion of Moldova as a wine tourism destination. More details are described in the Grants section.

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. Design and Technology Excellence Center “ZIPhouse” was created within Technical University of Moldova, as a public-private partnership between the Technical University of Moldova and the Ministry of Economy on the one hand, and the Employers Association of Light Industry representing the private companies, with USAID support. ZIPhouse aims to address the key challenges in workforce development, education, and academia’s collaboration with the private sector in the light industry.

The project supports ZIPhouse to develop its capacity to become a platform for creativity, design, technology, and workforce development.

To enhance ZIPhouse capacity and autonomy, the USAID Moldova Competitiveness Project works closely with the Center to address some of the Center’s operational and institutional constraints. To ease these constraints, the ZIPhouse Board (formed of representatives from TUM and APIUS) met in December 2015 and approved expenditure types and limits that the Center can make without the Technical University of Moldova’s (TUM) Rector authorization; in January 2016 the TUM rectorate voted to approve this decision. The Board also approved standard service packages (membership) fees, as well as prices for specific services offered by the Center. In January 2016, the USAID Moldova Competitiveness Project helped ZIPhouse administer these decisions, draft related documentation, and process these modifications with the TUM Financial and Legal Departments. These changes enabled ZIPhouse to become fully operational.

Assisted by the Project, ZIPhouse overcame the challenge of insufficient full time personnel capacity by hiring a person responsible for events organization, PR and communication, content building, and other specific tasks. Additionally, with Project support, the mechanism for performance-based financial incentives for the Center’s personnel was elaborated and approved by the TUM Rector.

Within the quarter, local consultant Olga Popa was contracted to work with the ZIPhouse management team on the development and implementation of guidelines for policy and operations, the textile and electronic library, the acceleration program (draft guidelines), and the production zone. She also helped elaborate the job descriptions for ZIPhouse technical staff. The elaborated job descriptions provided ZIPhouse management with a framework for action for its personnel. The textile and electronic library guidelines will facilitate cooperation between the ZIPhouse and APIUS, who is now leading the development of the textile library. Olga Popa also monitored and supported implementation of previously developed guidelines.

Text Box 5. ZIPhouse Results during January - March 2016

- More than 220 beneficiaries in total
- 17 beneficiaries from private companies
- 15 access cards sold
- 7 workshops and seminars, with more than 120 participants
- 7 teachers with improved skills in Pattern Making & Grading
- 4 community building events with more than 88 participants
- 5 collaborations for events organized by other parties (33 working sessions in total)
- 58,605.00 MDL earnings (compared to 37,000 MDL in previous quarter).

During the reporting period, the Project also collaborated with ZIPhouse and APIUS to set up the agenda of the events for the next two months. As a result, the following seven workshops and seminars were organized for ZIPhouse's members to have the opportunity to improve their skills and knowledge:

- "MindCAD" – learning Computer Added Design for footwear;
- "Adobe Photoshop" – learning the particularities of using Adobe Photoshop in the fashion industry;
- "Lookbook" – learning the process from start to finish of creating a lookbook, from preparing the models and looks, setting up lighting and background, and taking the photographs, to editing the fashion images in Adobe Photoshop and using the photo shooting space and equipment from ZIPhouse;
- "Sales" - learning how to prepare for exhibitions and shows, thus increasing export sales. Led by Lisa Gill, a Peace Corp volunteer with more than 10 years of sales experience in the fashion industry.
- "Entrance to your business" - seminar for pattern making, offered as an individual project with Bevera Nord LTD (private apparel company) for its company's employees.
- "Access the complete WGSN universe" – webinar with Nicole McLennan, Client Service Administrator at WGSN, on discovering the opportunities offered by www.wgsn.com, including a technical presentation on how to use it.
- "Pattern Making & Grading" – professional training with Eva Margarethe Hillers, international expert from Senior Experten Service (SES) organization, pattern making and grading for diverse categories such as womenswear, menswear, denim etc. The training was addressed to private sector professionals as well as teachers from higher education institutions.

More than 120 students and professionals in total attended the above mentioned workshops.



Photo credit: ZIPhouse

Photo caption: 24 beneficiaries, professionals from the private sector and teachers, being awarded Certificates for attending 48 hours of professional training on "Pattern Making & Grading" with Eva Margarethe Hillers,

Another result achieved within the reporting period is the ZIPhouse team's improved knowledge in terms of using social media. This improvement is the result of a training provided by Creatego, subcontracted by the USAID Moldova Competitiveness Project. Efficient communication through social media accounts will increase the number of potential beneficiaries for the Center, help the Center gain the loyalty of its members and partners, and disseminate the Center's services and advanced knowledge to a wider audience. The ZIPhouse team now operates its Facebook account at a higher level, ensuring broader outreach for its activities. It is worth noting that ZIPhouse's community on Facebook reached 1,150 followers in March 2016. The complete assignment under this subcontract will be finalized by May 2016.

Strengthen ZIPhouse educational content. The USAID Moldova Competitiveness Project aims to enrich the education of the light industry's key players. To do this, the Project subcontracted the international expert, Francesco Veneziano, to establish collaborations between TUM and formal professional education programs at foreign institutions, since ZipHouse is a subdivision of TUM.

During the reporting quarter, Mr. Veneziano continued to work remotely from Italy to research potential collaborations, coming up with a draft list of universities to be considered for collaboration, both for students' programs, as well as for short courses for professionals. Veronica Midari, the workforce development expert from the USAID Moldova Competitiveness Project leading this activity, worked with Mr. Veneziano and the working group from the Project and TUM to prioritize the topics of interest, analyze the subjects for training programs, and start detailing the collaboration mechanism. The following universities offering short term courses for the target group were finally identified: Polimoda - International Institute Fashion Design & Marketing; European Institute of Design; SMR - San Sepolcro, Arezzo; and Secoli University. Regarding a joint degree in Fashion Design, the Project identified an Italian university, the Fine Art Academy de Como, which provides a joint degree program for fashion design. This institution is officially accredited and recognized by the Ministry of Education of Italy.

The project is planning to support TUM in signing agreements with these universities and developing an ongoing collaboration. Furthermore, TUM will independently manage its relationships with the Italian universities, which will positively impact education for the future workforce. This activity is under progress.

Boost creativity, entrepreneurship, and community building. ZIPhouse, with Project support, organized two events in a series of community-building and knowledge-sharing events called "Fashion Cappuccino". In January 2016, Olga Radu, an experienced marketing and communication specialist, talked to students and young designers on how to create a brand "identity," with tips and recommendations on how to correctly start to build a brand.

In February 2016, Kelly DeNooyer, a fashion designer from Bhavana World Project, talked to students and young designers about sources of inspiration for fashion designers, as well as the importance of inspiration in the process of creating a new fashion collection.

Two eveningwear brands, EHO by Evghenii Hodorojcov and Nikita Rinadi by Diana Gudumac, shared their experiences participating at the Red Carpet International Fashion Trade Show for Eveningwear in Dusseldorf, Germany, during an event organized jointly by the USAID Moldova Competitiveness Project and APIUS, at ZIPhouse. The owners of the brands shared their experiences participating at Red Carpet and similar trade shows with other eveningwear designers, as well as aspiring students and young designers. During the Question and Answer part of the event, Evghenii Hodorojcov and Diana Gudumac provided

useful tips and recommendations, and also shared their opinions regarding participation at trade fairs versus fashion shows.

In March 2016, a community-building event entitled “From Ideas to Action,” led by renowned Romanian speaker and mentor Natalia Cechina, attracted 35 participants. She encouraged students and young designers to act and transform their ideas into startups, and provided recommendations on how to transform ideas into actions more effectively.

Defining ways to improve education in professional schools. The professional skills gap is still defined as the main constraint for competitiveness enhancement. It has a particularly large impact on light industry development, in terms of quality as well as quantity of the workforce. The Project therefore launched a skills gap assessment of the light industry.

Overall, the goal of skills gap analyses is to identify gaps in skillsets that undermine the current performance and affect the level of competitiveness of the industries in Republic of Moldova.

For the apparel industry, the demand and supply were determined in terms of quantity and quality. Quality was measured on a scale of 1 to 5, based on the employers’ perceived level of competence. Each job role with the apparel industry was assessed. The job roles with the highest turnover were identified. The job roles most in need of continuing education courses were defined.

The skills gap analysis report lists the following key qualitative findings:

- Moldova competes with EU businesses (for design and quality) and with Asian firms (cheap and large labor force);
- The country’s apparel sector could have a specific niche due to its proximity to EU markets and the capacity to timely deliver small scale orders;
- Apparel production is moving from low value production schemes to high value added schemes. This requires a new skillset: design, language, IT, procurement, negotiation, legal competencies, budgeting and finance competencies, logistics;
- The supply of specialists offered by higher education is of average quality;
- The apparel industry’s biggest challenge is the high turnover of seamstresses (about 50%).

The skills gap assessment report states that apparel exports continue to be viable although salaries will be limited; this industry is to be encouraged to move towards higher value light industry exports. The report suggests that industry-led training initiatives should be supported and that professional education at universities and through the Vocational Education Training (VET) system should be strengthened.

A2.1. Activity 2: Streamline Manufacturing Processes

Implement innovative methods for workplace organization. To remain competitive, maintain existing foreign clients, and attract new ones, Moldovan apparel companies should focus on increasing efficiency and delivering higher value added services. However, increasing efficiency without increasing productivity is nearly impossible.

The USAID Moldova Competitiveness Project aims to increase productivity of apparel companies through targeted improvements throughout the entire value-chain of business operations in apparel, from raw materials to dispatch. Increasing productivity in production can be achieved through: (i) efficient planning, (ii) good workplace organization, (iii) good workflow organization, and (iv) by providing employees with better equipment and technology to more efficiently complete tasks and produce better products.

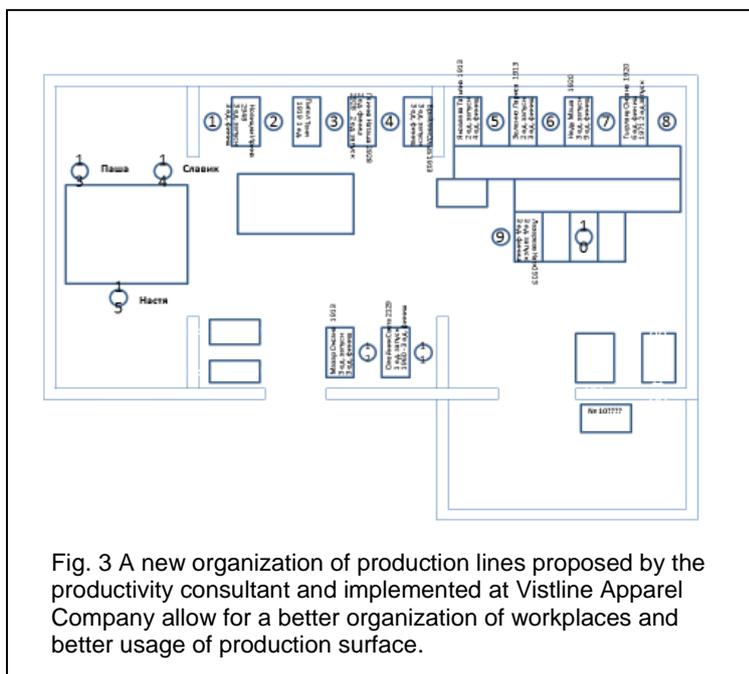
This Project activity was designed for large companies that provide services for foreign clients, as well as for small- and medium-sized enterprises and newly created companies which have started to produce under their own label.

Low productivity in small-sized companies is often caused by poor work organization. The project addressed this problem by sending a local productivity consultant, Demian Usanli, to five private 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 to accurately calculate time losses, and then developed and implemented a measurement plan to eliminate future losses.

Through processing the data from the “work day photography,” the consultant assisted the production specialists from the selected companies to: (i) eliminate the direct loss of working time; (ii) increase the intensity of labor by introducing more rational methods of work for seamstresses; (iii) make the organization of work processes rational; (iv) use the working time of qualified professionals efficiently; (v) introduce rationing of operations using the Modular Arrangements of Predetermined Time Standards method MODAPTS, (vi) introduce Key Performance Indicators (KPI) for rapid assessment of company effectiveness.

Text Box 6. Results of implementation of productivity enhancement based on better work organization

- In Zivax Maxi apparel company the introduction of rationing of manufacturing operations based on using MODAPTS method allowed productivity to increase by 25%;
- In Vistline apparel company the new flow organization allowed better use of the production surface and increase productivity by 15-20%;
- The new organization in the cutting department of Olga Ceban Apparel Company allowed productivity to increase by 20%. Due to synchronization of seamstress’s performance the production cycle in the sewing department has been reduced from 4 days to 1 day;
- In Oldcom Footwear company the optimization of production flow has reduced the time for support operations and increased the production time by 5-7%;
- In Bit Program company. as a result of new flow organization and synchronization of production operations the productivity increased by 10-15%.



The consultant also assisted companies in implementation of workflow organization improvements, which will lead to productivity enhancement and a reduction of the production cycle and the quantity of unfinished goods within the workflow.

To assist large- and medium-sized apparel companies to increase productivity, USAID Moldova Competitiveness Project identified five companies (Ionel, Mobile, Maicom, Portavita and Premiera Dona) which expressed interest in making changes. This companies will be assisted by the international consultant, hired by the USAID Moldova

Competitiveness Project, who has large experience in production organization and productivity enhancement. The assistance will start on April. The consultant will conduct an assessment of the current productivity level and the technical and technological level of the selected apparel companies. The assessment will be focused on: (i) current production systems used (degree of sectionalization/specialization, handle type and size, methods of movements and storage, production flow and storage patterns, controls) planning/scheduling and plant quality control; (ii) description of the existing production systems used by the companies and identification of the bottlenecks in the operation system which are negatively affecting productivity in each company; (iii) description of the existing level of mechanization and computerization and how it influences company productivity.

Implementing innovative technological solutions for productivity increase. In addition to implementing efficient workplace organization, companies can increase labor productivity by providing employees with better equipment and technology to more efficiently complete tasks and enhance product quality. As such, the USAID Moldova Competitiveness Project decided to assist companies in this endeavor by providing grants. Project Light Industry team, Maria Gheorghita and Tatiana Durllesteanu, together with the Project's Organizational Development Specialist/SEED Fund Manager Diana Grigoriev, developed the main conditions for grants applications, which were then published on the webpage civic.md. The deadline for applicants is April 17, 2016.

**Text Box 7. Grants for light industry
Distribution according to the companies' type**

- Micro companies – up to ██████ per selected applicant,
- Small companies -up to ██████ per selected applicant,
- Medium size companies -up to ██████ per selected applicant,
- Large companies – up to ██████ per selected applicant.

Total Grants value ██████.

Fostering quality control systems in plans. Quality can be ensured both by in-house quality control of manufactured products, as well as through the implementation of effective quality management systems. The Project has assisted two light industry companies in implementing a Quality Management System (QMS). Several light industry companies were contacted and told the advantages of implementing Quality Management Systems. Based on companies' commitment to implement a Quality Management System, the Project selected two apparel companies – Artizana, for implementation of ISO 9001 and ISO 18000 standards, and Zivax Maxi, for implementation of ISO 9001 standard. The Project also identified the local consultants who have knowledge and skills in the implementation of QMS.

Creating brands and products in line with fashion trends. To foster creativity and upgrade the local design skills of private brands, which should be in line with the regional and international fashion trends, the USAID Moldova Competitiveness Project contracted Bhavana World Project to assist five Moldovan companies that produce and sell their private collections in the local market.

International design consultant in women's wear, Kelly DeNooyer, based in Italy, began providing assistance by conducting an assessment of several companies' design skills and technical abilities, and then evaluated the designs and women's collection of eight apparel companies (Mobile, Natalia Melnic, Allert&CO, Tricon, Alina Bradu, Laviese, Move and Raquette Group). Based on the assignment, the international consultant selected five apparel companies (Mobile, Natalia Melnic, Allert&CO, Alina Bradu, and Raquette Group) which will receive assistance in developing a collection for the Spring/Summer 2017 season. The consultant will direct the selected companies to create a personalized seasonal theme adapted to each company's brand. A theme should be the collection's storyline; it guarantees a harmony of colors, patterns, and fabric within the line and ensures coherence with the brand.

Increasing product quality by accessing better raw material and accessories stocks.

In light industry, product quality depends on the quality of raw materials and accessories. At the same time, the products should be in line with recent trends.



Photo credit: Julia Allert

Photo credit: The designers of Georgette and Katea Gry brands selecting raw material at Premier Vision Exhibition.

In February 2016, the USAID Competitiveness Project supported four designers from apparel companies that produce and sell under their own label - Mobile, Allert&Co, Raquette Group and Natalia Melnic - to participate at Premier Vision and Texworld international exhibitions, where they had the opportunity to see the color trends of raw materials for the next season.

Also, the Project facilitated a visit for a group of 16 designers from 14 apparel companies to the stocks of raw materials and accessories in Prat region of Italy. Designers visited 14 specialized stocks of raw materials which were selected by international consultant, Angela Dobinda, according to the needs of Moldovan companies.

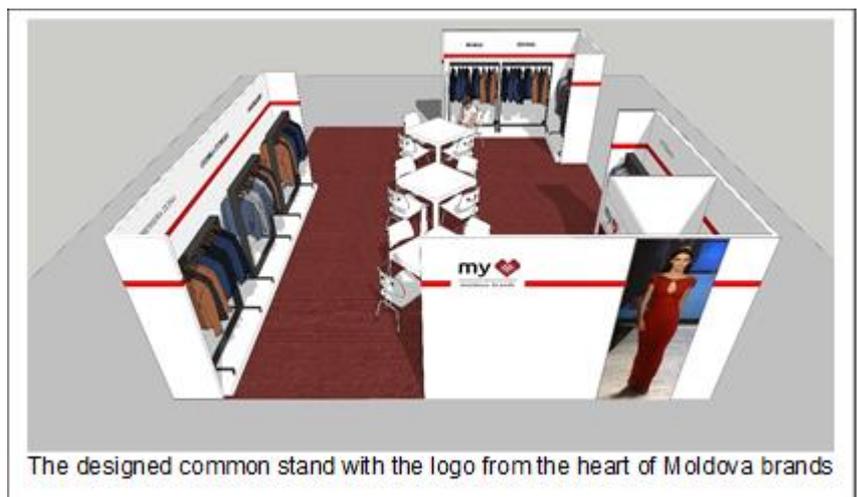
During the visit, the international consultant guided the delegation of Moldovan apparel designers and acquisition specialists, helping them to select the raw material for their future collections and to negotiate with fabric and accessory suppliers.

The Moldovan designers and acquisition specialists selected more than 100,000 Euros worth of raw materials and accessories.

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 ***Penetrating new markets through participation at international exhibitions.***

Participation at international exhibitions is one of the most effective ways to showcase Moldovan light industry products and to attract new clients. Therefore, USAID



The designed common stand with the logo from the heart of Moldova brands

Moldova Competitiveness Project assisted local light industry companies in participating at most major international exhibitions. Moldovan brands premiered on the global market under the MY Heart Moldova umbrella brand. Four years of success in the local market resulting from the promotion of light industry brands under Din Inima Branduri de Moldova, an initiative developed with USAID support, motivated the companies to go forward and consolidate their efforts to penetrate the international market under the inspiring and locally recognized and appreciated brand, MY Heart Moldova.

Table 1. Participation at international exhibitions. Companies' achieved results

International exhibition	Participating Company	New Contacts	Trial orders	Signed contracts
Premier Vizion	lonel	8	\$77,000	\$ 233,000
	Steaua Reds	4		
	Odema	6		
	Portavita	24		
Textilegprom	Infiniutil	5		\$ 280,000
	Saltoianca	3		\$ 220,000
	Intercentre Lux	12		\$ 350,000
	Odema	9		
	lonel	7		\$ 55,000
	Portavita	8		
	Steaua Reds	11		\$ 132,000
CPM	Intercentre Lux	7		\$ 1,300,000
BIJORHCA	JuBijoux by Ana Popova	24		\$ 15,000
	Marinelle	10	\$1,500	
	Natalya Maskvina	10	\$1,200	
Red Carpet	EHO by Evghenii Hodorojcov	10		
	Nikita Rinadi	10		
GDS	Oldcom	17	\$20,000	
	Tighina	5		
	Cristina	12		
	Zorile	1		
	Hincu	0		
	Floare	20		
	Tiras	2		
	Batistrada	1		
	Vitalie Burlacu	3		\$ 15,000
Total		229	\$99,700	\$ 2,600,000

The Project supported participation of seven apparel companies at three international exhibitions: Premier Vision (France) for manufacturing services, and Textilegprom (Moscow) and CPM (Moscow) for private label collections. The repeated participation of six Moldovan companies in international exhibitions positioned the companies as reliable partners, and they registered impressive results. At the same time, Portavita, a company that participated

for the first time at Premier Vision, was surprised by the high interest in its products from potential clients, and by the number of established contacts present at the show.

Notably, the apparel companies signed a total amount of \$2,647,000 in contracts, all of which are for high value added products (95% of them being for FOB and private label). Participation in the spring international exhibitions allowed local apparel companies to create 104 contacts, some of which will hopefully result in concrete contracts. For the first time, the lonel company received a testing contract for 2,000 suits from a French company based on FOB scheme. The Mobile company, which is more experienced, has agreed to consult with lonel on how to correctly work on an FOB scheme.

**Text Box 8. Testimonial on CPM
2016 trade fair participation**

"We are very grateful for the support we received from the Project to participate in the international exhibition CPM. Participation in this exhibition allowed us to sign contracts with four networks that range from 40-120 stores worth \$ 1.3 million. These contracts will cover about 40% of the production capacities."

*Anatoly Dzernovici
President of Intercentre Lux*



Photo credit: Georgetta Mir

Photo caption: Potential clients selecting clothes from EHO collection at the Fashion Exhibition Central Asia in Kazakhstan, March 10-12, 2016

The USAID Moldova Competitiveness Project helped three Moldovan handmade fashion accessories manufacturers, Ju-Bijoux, Marinelle, and Natalya Maskvina, exhibit their handmade collections to an international audience at the B2B trade fair Bijorhca 2016, organized in Paris from January 22-25, 2016.

Participation at this important trade platform exceeded the expectations of Moldovan designers, enhancing their jewelry exports to EU buyers and allowing them to enter new markets. Real-time feedback from Ju-Bijoux designer, Ana Popova, described how the new

buyers were from all around the world, specifically, the United States, Japan, and Spain. Marinelle and Maskvina returned home with trial orders from France, Italy, Belgium, and Spain All buyers remarked that they were impressed by the jewelry design, style, and quality.

The U.S. buyer was fascinated by the Ana Popova collection noting that, "For more than five years we are looking for suppliers at Bijorhca and we are very sorry to not notice your collections before." The buyer then placed an order.

Now the young Moldovan designers are challenged to quickly grow their local production teams to fulfill the orders, and are looking at opportunities to showcase in other trade events. Handmade accessories have the potential to become a high-growth segment for export in Moldova's fashion manufacturing industry.

The USAID Competitiveness Project also supported the participation of nine footwear and leather accessories companies - Oldcom, Cristina, Tiras, Hincu, Floare, Tigina, Zorile, Batistrada and Vitalie Burlacu, at the GDS Trade Fair in Dusseldorf, Germany. The GDS fair took place from February 10-12, 2016. The appearance of Moldovan brands in a new and appealing manner, under MY Heart Moldova, started to attract potential European buyers as well as large retailers from Asia and Africa.

Text Box 9. Testimonial on Bijorhca 2016 trade fair participation

"The results of the participation at Bijorhca 2016 in Paris are above any expectations. We had a lot of interested buyers from all around the world. Many of them placed orders, so now we are considering to enlarge our production team."

*Olga Nedbailo
Business Development Director
"Ana Popova"- Designer Jewelry*



Photo credit: Vitalie Burlacu

Photo caption: Moldovan manufacturers exhibiting under umbrella brand Din Inima (MY Heart Moldova Brands) at GDS shoes and leather accessories international tradeshow, Dusseldorf, Germany, February 10-12, 2016

Mr. Jordan Saliman, the international expert contracted to improve the companies' ability to prepare for participation at GDS and to expand their sales, provided support in matchmaking Moldovan footwear producers with buyers and other potential clients by inviting and setting up meetings with potential clients at the Moldovan stand. As a result of GDS participation, footwear and leather accessories producers received more than 66 contacts for potential collaborations with buyers from the EU and Russia, including large retailers, such as Mephisto, as well as suppliers of raw materials. The companies will now work from home to transform contacts into sales. Negotiations and sample productions are being held now with four potential buyers, and two orders from Italian and Russian buyers have already been placed and will be delivered by Moldovan companies during next months.

The MY Heart Moldova umbrella brand shows that Moldova's light industry is moving towards higher value private products and brands. This raises the profile of Moldovan fashion in Moldova and abroad. It also means that more value from Moldova's light industry stays in Moldova as companies' design, produce, and sell their products locally. As a result, more jobs will be created to strengthen and grow Moldova's economy.

To support the Activity "Internationalization of Moldovan Fashion Brands on Regional Markets", the USAID Moldova Competitiveness Project researched existing opportunities and invited Anton Dell, the founder and CEO of "Anton Dell Fashion Consultancy," which provides high quality professional services to fashion brands globally, to provide a talk on 'Best Export Practice for Fashion Brands' and to explain to Moldovan brands the mechanism for reaching new markets by connecting with international agencies and distributors. The USAID Moldova Competitiveness Project arranged Anton Dell's visit for April 12-13, 2016.

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

Launching Din Inima common stores to consolidate Din Inima brand. Multi-brand common stores under the Din inima Umbrella Brand have proven to be very effective in generating sales. In March 2016, five apparel companies (six brands: Georgette, Alert&Co, Secana, Katea Gry, Premiera Dona, and Ionel) with the support of



Photo credit: Pelican Design, design company

Photo caption: The outside promotional panel of the common store under the logo Din inima branduri de Moldova, which opened in February 2016

the USAID Moldova Competitiveness Project opened a new common store in the center of the Chisinau city, on the main street, Stefan cel Mare. The Project assisted with one of the most critical elements for the success of this store: a professional and efficient store layout and design according to the merchandising rules (path to move through the store, the location of goods in shop, corner for highlighting the brand).

The total investment to renovate the existing space, furniture, and light came to approximately 55,000 Euro, 90% of which came from private investments. This store will be a motivational example for other companies. The total sales during the first month of all brands exceeded companies' expectations, totaling more than 350,000 MDL.



Photo credit: Georgetta Mir

Photo caption: Moldovan client buying fashionable cloth under Sekana brand in the common Din Inima Fashion Boutique opened in March 2016 in Chisinau with USAID support

Objective 3. Improved Sector-Enabling Environment and Increased Capacity

Supporting APIUS to locally enhance the profile of Din Inima campaigns. The USAID Moldova 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 to keep building brand equity around a well thought out marketing and PR campaign. Until now, Din Inima consisted of only two fashion shows per year (Spring and Fall), associated with three-week advertisement campaigns for participating Moldovan companies. The pre- and post-PR was very weak, and the participating companies would like for part of the marketing/PR initiatives to contribute to growing their sales, in addition to building Din Inima image. No other marketing activities were conducted for Din Inima during the 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 the 2016 Din Inima brand/campaign. Olga Radu developed a draft marketing strategy and PR plan for 2016, which were then presented to the companies. The marketing strategy presents the key messages that the industry and Din

Inima umbrella brand should promote: quality, added value, job creation, social responsibility, and transparency; and the marketing approach: switching from individual marketing and PR efforts to common actions; complementarity of general Din Inima PR and individual PR; moving from awareness to sales marketing, and emphasizing sales events. This presentation was the first step towards organizing the Din Inima Spring campaign from March - May 2016. The feedback from companies regarding the draft strategy has been collected, and a final marketing strategy will be presented in April. In the meantime, the USAID Moldova Competitiveness Project has worked jointly with APIUS and identified more than 20 brands interested in participating in the campaign by co-sharing 50% of the costs, according to the proposed draft strategy and action plan. One of the PR instruments selected for the spring campaign is the appearance of advertising spots on LED screens. About 20 companies intend to participate in the LED campaign, which will take place from April - May 2016. Preparations for the appearance of 11 brands - Georgette, Sekana, Miss Vivien, Irka Shoes, Mallena, Ana Popova, Crème Brulee, Artizana, L'ame de femme, Vitalie Burlacu, Feodora - on four LED screens during April has been completed. The Project also decided to provide support for creation of professional lookbooks for 13 interested brands.

Support APIUS to hold twice-a-year Moldovan Fashion Week. A new, upscale visual concept for fashion shows has been developed by Casa Imago and presented by Olga Radu. The concept has been adapted from one main event, "Fashion Show," to the "Moldova Fashion Days" concept, which is much wider and includes the main biannual professional fashion event, but also allows supplementation of the Moldova Fashion Days with fresh satellite events (both shows and sales events). This large concept is in line with the newly developed Din Inima strategy, focusing on both shared and individual promotion and sales events; as well as fusion with other sectors events (combining fashion with wine, tourism, etc.). This innovative concept will provide inspiration, flexibility, and opportunity for growth and development. With the USAID Moldova Competitiveness Project support, Casa Imago developed a general visual concept and design the visual identity and the promo materials for the 2016 Spring edition.



Figure 4. Design for Moldova Fashion Days Spring 2016 according to the new visual concept

Moldovan Fashion Days was held on March 5-6, 2016. A total of 23 local brands participated at this event, split into two catwalk shows. Through the shared efforts of APIUS, the Project, and event organizers, an impressive PR push was generated, with more than 40 appearances in mass media presenting and commenting on this fashion event. The event reached 150,000 visualizations while being translated online on privesc.eu.

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

The USAID Moldova Competitiveness Project started the implementation of activities aimed at consolidating APIUS' capacity. In order to evaluate the existing level of knowledge and skills in various fields, a working group was created, consisting of several companies that are APIUS members, APIUS Executive Director and APIUS President. The working group completed a knowledge and skills matrix, which included the following domains: Governance, Administration, Financial Management and Finance, Organizational Management, Service Delivery, and Advocacy. This will delineate activities that will be supported through grants and those that will be supported by the contracted consultants.

Additionally, in order to empower the APIUS Executive Director with increased authority, it was determined that changes needed to be made to the association statute. To implement this, the Project contracted a local consultant, Oleg Utica, to complete the necessary changes.

As one of the Project's priority is to assist APIUS to develop an industry whitepaper, the USAID Moldova Competitiveness Project identified an appropriate international consultant, Heikki Mattila, who will be involved in this activity, since the consultant has previously developed a high quality Trade Diagnostic Study for the industry.

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. During the reporting period, the Project continued to work on the skills gap assessment for the ICT industry. The results of this activity will serve as a basis for decision-making and designing the Project's educational activities over the next years.

As part of the assessment, survey questionnaires for different target groups (employers, students, and young professionals) were tested in pilot interviews, refined accordingly, and posted Magenta's online platform. The surveys were published both in Romanian and Russian, and the data collection process was conducted during February and March 2016. In February, Skills Gap Assessment Expert John O'Sullivan visited Moldova for the next stage of the assignment to coordinate the process and verify the progress of the interim data that had been collected. As the achieved sample sizes were insufficient for the research to be conclusive and representative, Mr. O'Sullivan, local expert Igor Bercu, and the Magenta research company representatives formulated an action plan to improve the statistical sample size. The Moldovan Association of ICT Companies (ATIC), as one of the main stakeholders of the research, was actively involved in helping with data collection from companies and young professionals. In addition, to ensure a higher response rate, Magenta conducted telephone interviews with non-ATIC ICT companies. It was decided that the results of the skills gap assessment will be presented by the experts during the Moldovan ICT Summit, organized on April 27-28, 2016.

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

Motivate learning of ICT through Robotics. The Educational Robotics program (Roboclub) started by USAID CEED II Project in 2014 was expanded as a component of STEM education modernization. Eight new educational institutions, selected in December 2015, were provided with robotics kits and included in the Roboclub program. The sets were transmitted on January 12, 2016, during a ceremony organized in collaboration with the Ministry of Education, and was held in the government building with invitees from the beneficiary institutions, USAID, partner organizations, and the press.



Photo credit: Ion Savin

Photo caption: Robotics sets and Classroom nameplates ready to be transmitted to the beneficiaries

Each beneficiary institution received seven LEGO Education MINDSTORMS EV3 core sets for Educational Robotics activities, seven chargers, three extra sets of spare parts, and a software site license. There are more than 9,000 total students within these eight institutions (as presented in the table below).

Table 2. New institutions that joined the Robotics initiative

#	Name of the institution	Location	Number of students in the institution
1	Theoretical Lyceum "Gheorghe Asachi"	Chisinau	1833
2	Theoretical Lyceum "Mihai Eminescu"	Balti	1597
3	Theoretical Lyceum "Vasile Alecsandri"	Balti	1198
4	Theoretical Lyceum "Constantin Stere"	Soroca	1144
5	Theoretical Lyceum "Alexandru Ioan Cuza"	Chisinau	1100
6	Theoretical Lyceum "Mihai Eminescu"	Drochia	936
7	Theoretical Lyceum "Mihai Eminescu"	Anenii Noi	865
8	Theoretical Lyceum "Ion Creangă"	Cimislia	690
TOTAL		8 locations	9363 students

A total number of 116 students from these institutions take robotics classes regularly. These classes will help them improve their learning outcomes in STEM fields, as well inspire them to pursue a future career in IT or engineering.

One of the main activities within the Educational Robotics initiative is the *FIRST® LEGO®* League robotics competition. The second round of *FIRST® LEGO®* League Moldova took place on February 20, 2016. *FIRST® LEGO®* League is often considered the most important international youth competition in the field of technology and robotics. It is held in 80 countries and gathers more than 230 thousand participants annually. Guided by adult coaches, *FIRST® LEGO®* League teams researched problems pertaining to recycling and developed a solution, which was later presented to the jury panel.

The teams also designed, built, and programmed a robot using LEGO® MINDSTORMS® technology and competed on a table-top playing field while also applying *FIRST® LEGO®* League's Core Values, which focus on friendly competition and teamwork.



Participation in this competition helps students apply science, technology, engineering, and math (STEM) concepts, as well as use their imagination to problem-solve. They also develop critical thinking and team-building skills, basic STEM applications, and presentation skills. International experience has proven that participation in *FIRST*® LEGO® League robotics competition increases student interest in STEM fields and careers.

The national competition was organized in close cooperation with ATIC, the Ministry of Education, Starnet, Center for Children and Youth Artico, and ONG Robotika from Estonia. A total of 85 participants, grouped in 13 teams from 10 institutions, competed at *FIRST*® LEGO® League Moldova; five of them were awarded by the jury in different categories.

Table 3. Awarded nominations for the participants at *FIRST*® LEGO® League Moldova, in February 2016

<i>Award category</i>	<i>Team name</i>	<i>Institution</i>
<i>Champion</i>	RoboJunior	Lyceum Ion Creanga
<i>1st place Robot Game</i>	RoboRangers	Center for Children and Youth ARTICO
<i>1st place Robot Design</i>	Phoenix	Lyceum M.Eliade
<i>1st place Project</i>	RoboCrafts	Poly-Technical College from Chisinau
<i>1st place Teamwork</i>	Biotope	Lyceum Orizontul

His Excellence, James D. Petit, Ambassador of the USA in Moldova, and the Deputy Minister of Education, Elena Cernei, were among those present at the award ceremony, and commented on the high impact of this event on the future careers of the participants.



Photo credit: Ion Savin

Photo Caption: Team RoboJunior, Champions of FIRST LEGO League, with coaches and jury

The event covered extensively by the media in more than 20 publications, local TV channel reports, and on large online news portals. This coverage highlights an increase in public interest toward Robotics and STEM in general.

The Champion award winning team, as well as the winner of the Robot Game Cup, were invited to participate at *FIRST® LEGO® League Estonia* on March 12-13, 2016, to represent Moldova and compete alongside 41 other teams from four countries: Estonia, Sweden, Lithuania and Ukraine.

Initially, only one winning team was expected to travel to Estonia for the international competition, so the USAID Moldova Competitiveness Project is helping to raise money for the second team by organizing a fundraising campaign, including a crowdfunding campaign on the local platform Guvern24.

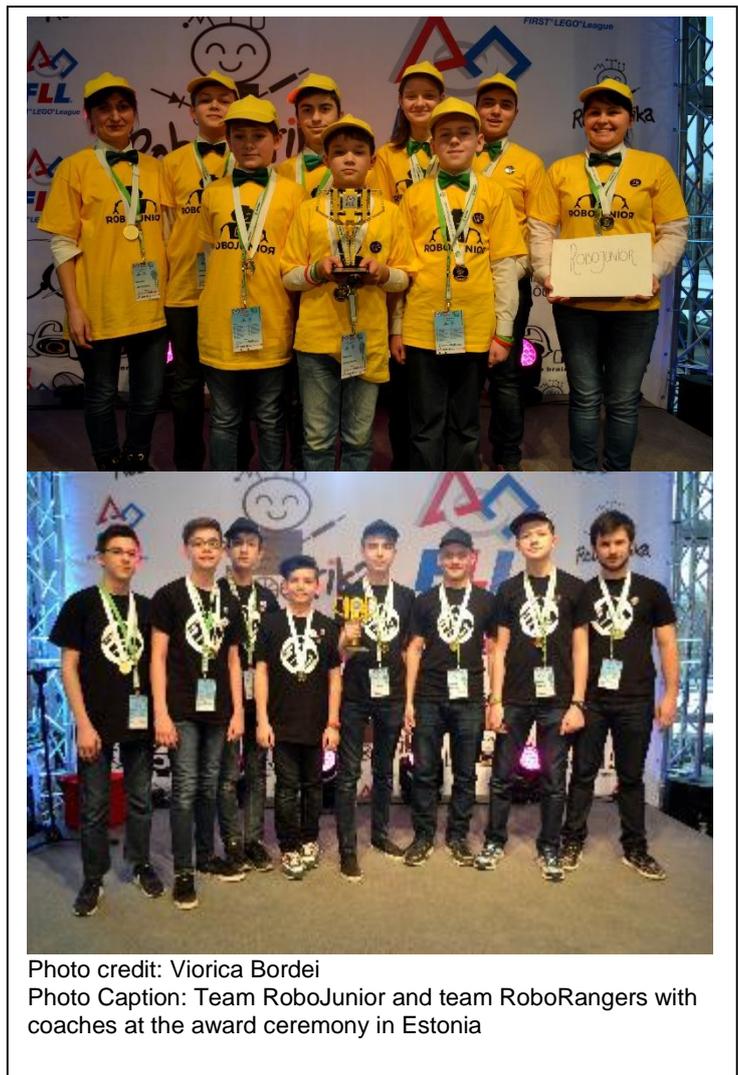
The participation of the Moldovan teams at *FIRST® LEGO® League Estonia* was very successful. The international jury of the competition awarded them:

- 1st place and trophy for " Robot Design, Strategy and Innovation category" – to the team RoboRangers;
- 1st place and trophy for " Teamwork" - to the team RoboJunior.

The Moldovan Robotics teams were later on invited to compete at *FIRST® LEGO® League Open European Championship 2016*, which will take place on May 4-7, 2016 in Tenerife, Spain, among more than 90 teams from 50 countries.

The project will continue to coordinate the Moldovan teams' preparations for the Open European Championship.

In the future, the project plans to transfer the implementation of the Robotics activity through a grant to ATIC, which has been the main partner in this initiative since the beginning. The Project has worked closely with ATIC, advising them to develop a grant proposal for this purpose.



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

This activity has been postponed as the approach needs to be closely coordinated with the VET project financed by Austrian Development Agency (ADA), and an appropriate consultant has yet to be identified to support the activity.

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

Improving the ICT education and fostering innovation through ICT Center of Excellence Tekwill. The USAID Moldova Competitiveness Project is providing mentorship support to ATIC, the direct USAID grantee, to develop Tekwill. In order to connect Tekwill with the technology business, startup, and education community in Romania, in January 2016 the Project supported a study visit to Bucharest. During this trip the team met with IBM representatives from Romania to discuss a specific action plan for the implementation of educational programs that have been successful in Romania. The study visit participants visited several co-working spaces and accelerators (Techhub, Mobilehub/ WeLoveDigital, Impacthub and one makerspace, NOD Makerspace), attended the Gala of Software and Services Industry Employers Association of Romania (ANIS), and met with other potential partners. The delegation included representatives of ATIC (Tekwill implementer) and TUM (Tekwill founder). In addition, the Project supported Tekwill's discussions with several potential external donor programs (Infodev / World Bank, Spider/SIDA) for a possible connection to support the Center's content development.

Supporting the creation of ICT ecosystem through the development of the first IT Park. The USAID Moldova Competitiveness Project provides assistance to the private initiative of the Starnet company to develop the first IT Park in Moldova. While Starnet has already invested more than USD 2 million in physical infrastructure for the future IT Park, it requires an additional investment of USD 8 million. To raise additional financing, the Project assisted Starnet in

developing the business and investment concept for the IT Park. This will be used to coordinate with the financial institution that funds the initiative. In January 2016 the initial assessment of the IT Park implementation feasibility was undertaken, which resulted in the development of an activities roadmap for IT Park implementation.

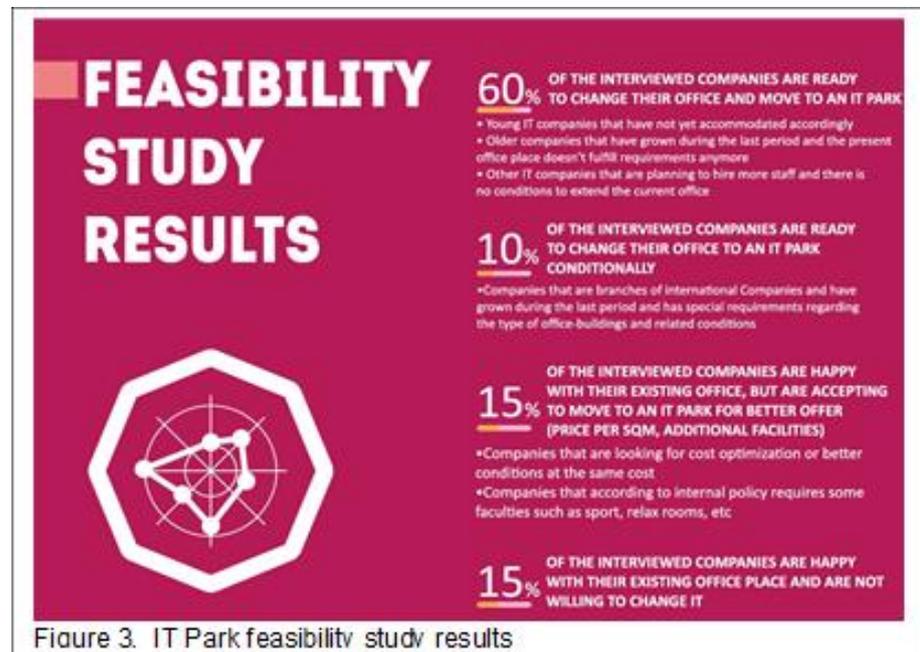


Figure 3. IT Park feasibility study results

To ensure increased credibility of the IT Park project to the potential financial partners and to provide the necessary input to the architecture firm, investment advisors, and Starnet management in defining the components of the IT Park and its development phases, a local market research study was conducted to assess the demand for IT Park services in Moldova.

The assessment was conducted with the support of the Moldova Investment and Export Promotion Organization. During the assessment, the consultant conducted a series of one-on-one interviews with Moldovan IT companies and submitted a web questionnaire to other IT companies to solicit information. During March 2016, the results of the study, as well as the IT Park concept, were presented to the USAID Development Credit Authority (DCA), investment officers, and financial institutions.

The roadmap that was developed was deemed sufficient by the beneficiary, Starnet, and the project moved on to the next stages of implementation. In this respect, Starnet subcontracted an architecture firm to develop the architectural master plan, and started communications with the potential financial partners to assess the available options and schemes for the local and international market conditions to obtain the necessary financial resources.

Based on the discussions with potential financial partners such as the European Bank for Reconstruction and Development and the local bank Mobiasbanca (part of Groupe Societe Generale), a list of questions and requirements were raised that will need to be clarified before entering into any potential financial agreements. For the option with Mobiasbanca, the use of DCA mechanism was discussed and analyzed by the potential borrower, Starnet, and the bank.



Photo credit: USAID Competitiveness Project

Photo caption: Work planning session on developing IT Park business concept (at the desk- from left to right: Alexandru Machedon and Oleg Burlacu – Starnet top management representatives; Pat Byrne, Patrick Daly)

A3. Objective 2: Expanded Market Linkages

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

The development of IT solutions for non-IT sectors aims to increase the use of IT products and services by companies from the non-IT sector that will both contribute to their productivity and expand the local market for domestic IT companies.

During the reporting period, the Project developed an assessment of the domestic IT products and services available for the project assisted industries. The assessment revealed the following issues within non-IT companies that negatively impact their productivity:

- Weak interconnection and communication between companies' subsidiaries;
- Limited access to information for employees;
- Operated datasets do not follow common best practices;
- Insufficient analytical capacity for M&E and reporting on the company's performance;
- Outdated and inefficient ICT infrastructure;
- Declining performance in accounting, HR management, sales, and customer relationship management;
- Unqualified human resources for supporting the IT infrastructure.

In order to increase productivity and efficiency in non-IT companies, the Project decided to support the companies through the implementation of IT solutions aiming to increase the productivity and efficiency of the companies from targeted sectors. Such solutions include retail management software, accounting software, online tours booking software and online selling platforms.

The first outcome of this support was the development of a Concept Note for implementing the Customer Relationship and Sales Management solution for light industry. In February 2016, discussions were held with the representatives of the IT companies, APIUS, and representatives of the fashion industry regarding the implementation of Customer Relationship Management (CRM) software. A mechanism for co-financing the implementation of the CRM software, as well as a single portal for publishing information about local fashion production, was identified. After discussions and negotiation with APIUS, its member companies, and the selected implementing company, Bina Systems IT, it was agreed that all APIUS members will receive a 30% lifetime discount on the Bina Systems products and services, and Bina Systems will provide its BinaSmartBusiness Cloud solution to fashion industry startups for free, for a period of up to six months.

In the tourism sector, the project initiated a discussion with ANTRIM members based on the assessment results to identify products and an implementation mechanism for the IT solutions in order to promote the tourism sector in Moldova.

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

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

During the reporting period, the Project conducted interviews with local IT companies to identify their readiness to export products and services that have been successfully implemented in Moldova. This activity is being conducted with Moldova Investment and Export Promotion Organization MIEPO, which is responsible for developing promotional materials for the government IT solutions that are being developed by domestic IT companies. The Project facilitated communication between MIEPO and the domestic IT companies in order to develop an activity plan to promote their IT products on the external market. The Project will cooperate with the Ministry of ICT and MIEPO to gain support in promoting the local IT products through the embassies of Moldova abroad.

Enhancing market linkages through 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. During the reporting period, the USAID Moldova Competitiveness Project selected 10 companies to receive assistance within the Pilot Entry

Coaching Program for the German Market. An introduction to the program was conducted by Mr. Till Hahndorf, Marketing Consultant.



Photo credit: USAID Competitiveness Project

Photo caption: Presentation of the German Entry Coaching Program to Moldovan IT companies. (on the left are representatives of the IT companies, on the right - the German Market Entry Consultant Till Hahndorf)

As part of this program, the USAID Moldova Competitiveness Project will co-finance the participation of Moldovan IT companies in the program. Out of the total cost of the program per company which consists of █████ Euro, the project will cover █% and each company will pay █% which is █████ Euro. The participation at the program will result for participating companies in a certification for the German IT market, individualized marketing consultancy from German-based BW Business Bridge IT marketing company, two years of ongoing individualized marketing support, and personal introductions to potential German partners and clients.

The Project will provide individual support to each company to implement the German market entry roadmap, such as participating at specialized events and providing technical assistance. Memoranda of understanding were signed with 10 IT companies. Based on the memoranda, the IT companies signed contracts with BW Business Bridge, which will provide market entry services in Germany.

After the launch of the German Entry Coaching Program, the project initiated the design of a new program to enter three new European countries. The program will consist in defining the target markets, identification of the companies that will be assisted and roll-out of the program.

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

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

Fostering Moldova tech entrepreneurship with global ecosystem builders support. To set up the foundation of the ICT Sector Strategic Development Roadmap, a high-level workshop entitled “Changers Challenge” will be organized to empower developing markets to grow into tech-entrepreneurial driven economies. It will bring sector leaders and influencers from countries with developed entrepreneurial ecosystems to Moldova, where

they will meet with the local stakeholders to collaborate in developing the ICT Sector Strategic Development Roadmap. The Roadmap will consist of recommended activities and policies needed to achieve a healthy entrepreneurial environment and knowledge-based economy in Moldova.

The Roadmap will represent the ICT sector development plan for 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. The drafting of the Strategic Development Roadmap is a process that will involve the participation of internationally well-known ICT industry development experts.

The Project contracted a consultant, Anca Albu, to coordinate the Changers Challenge event, which will be held on April 23-25, 2016. Approximately 20-25 people are expected to attend, including leaders and influencers of entrepreneurial communities and startup ecosystem builders from 20 different countries, including Malaysia, Chile, Ukraine, Poland, Bulgaria, Macedonia, Romania, Azerbaijan, Denmark, Estonia, and Lithuania.



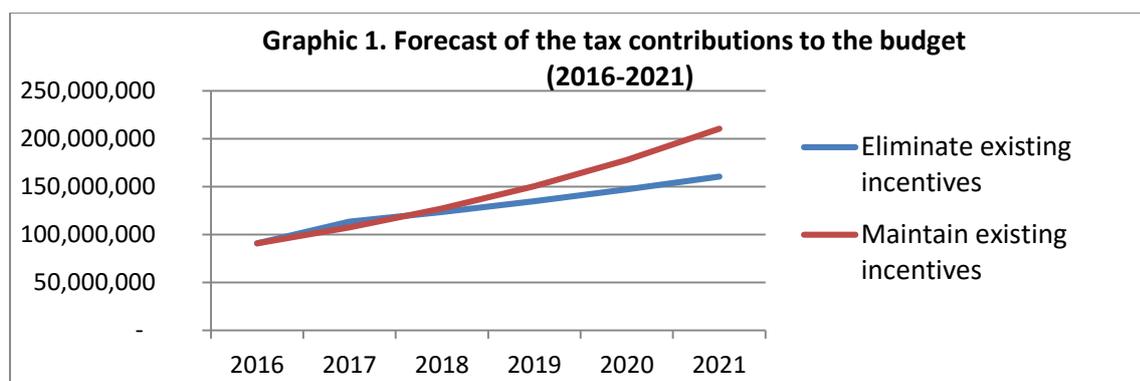
Figure 5. Cover page of Facebook Community Page

The results of this activity will be presented at the Moldova ICT Summit conference to ensure stakeholder buy-in. It will also help the Project design its future interventions for the improvement of the sector-enabling environment in the following years.

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

Keeping IT Park tax incentives to further stimulate the IT sector. Currently, Moldovan IT company employees benefit from tax incentives, which were introduced in 2005 for a five years' period and subsequently extended through 2016. During this period, the industry experienced significant growth. For example, ICT industry exports grew from \$159.5 million in 2013 to \$200.3 million in 2014. However, local IT industry experts are concerned about the impact on this positive export trend when the tax incentives expire in 2017.

At the request of the Ministry of ICT (MICT), the USAID Moldova Competitiveness Project developed a cost-benefit analysis of the scenario should the existing tax incentives be eliminated and the potential impact on the sector. Based on the information received from the National Bureau of Statistics, the National Social Insurance House, and State Tax Inspectorate, the analysis showed that maintaining the existing tax incentives will positively impact both the IT industry and the government through increased tax collections.



A draft law for prolonging the tax incentive was developed and feedback was received from the impacted ministries, such as Ministry of Economy, Ministry of Labor and Social Protection, and Ministry of Finance. The Project assisted MICT in adjusting the draft law according to the feedback received from the other ministries. The law will be submitted for first reading approval in the Parliament in the Q3 of 2016.

Include MICT in the medium-term state budgetary process. To enhance the Ministry of ICT capacity to coordinate the implementation of IT policies, the Project supported the Ministry to develop a Sectorial Spending Strategy for 2017-2019, which is a requirement for the medium-term budgeting framework of the government. This included: assisting MICT to negotiate the inclusion of the ICT sector in the budgeting framework with the Ministry of Finance and participation of MICT in the medium-term budgeting process. This will allow the Ministry of ICT to plan and use budget financing for the IT sector program. In this regard, the Project contracted, Eugenia Veverita, a public finance consultant, to support the MICT's inclusion in the medium term budgetary framework. With consultant support, the Minister of ICT submitted the official request to the Ministry of Finance to include the ICT sector in the medium term budgetary process. The negotiations with the Ministry of Finance will continue through April 2016. If the results are positive, the consultant will support the MICT in developing the Sectorial Spending Strategy for 2017-2019 as part of the medium term budgetary framework. As a result, the Ministry of ICT will gain a mechanism for accessing public budget financing for the implementation of IT sector development programs.

A3.3. Activity 3: Support ATIC

Strengthening ATIC's lobby and advocacy capacity. ATIC plays a vital role in the development of the IT sector by advocating the needs of the IT companies to the Government for promoting IT sector enabling regulations. ATIC is continuously collecting information from its members regarding the issues that the IT companies are facing and based on this information, ATIC is developing position papers and proposals for the Government to solve the identified constraints. Increasing its lobbying and advocacy capacity has therefore been one of the project's earliest priorities. The project envisions that ATIC will obtain advocacy capacity assistance from Project-hired consultants and from other associations, such as American Chamber of Commerce, which are more powerful and successful in advocating for their members' interests.

In cooperation with the USAID BRITE Project, the USAID Moldova Competitiveness Project implements a program for strengthening the lobbying and advocacy capacity of business associations, including ATIC. In January 2016, Nicole Farnsworth, the international consultant contracted by the Project for the assessment of the lobbying and advocacy capacity, had several assessment interviews with ATIC administration and prepared a questionnaire to determine the issues faced by the IT. Based on this information, an agenda for interventions will be developed. During the reporting period, a preliminary assessment for ATIC was conducted, a questionnaire was developed for defining the intervention agenda,

and assessment discussions with the association's board members were initiated. As part of the advocacy capacity strengthening program, the most critical issues faced by the IT sector were identified. To support ATIC in solving the identified issues, the two projects located experts to identify solutions to these issues and develop a policy proposal for the government institutions to solve them.

Strengthening ATIC's organizational capacity. During the reporting period, the Project conducted ATIC's organizational capacity assessment. As a result of the assessment, a Capacity Development Plan was developed for ATIC which stipulates assistance in the following areas: Governance, Administration, Financing and Financial Management, Organizational Management, Service Provision, and Advocacy. The organizational capacity assessment results were analyzed by Nicole Farnsworth from the USAID BRITE Project who specializes in developing proposals for individualized assistance to ATIC and other associations.

Supporting the organization of Moldova ICT Summit. For the last six years, the USAID Competitiveness Project and its predecessors have supported ATIC's preparations for the organization of Moldova ICT Summit. The dates for the 2016 Summit have been set for April 27-28, 2016. The project was actively involved in drafting the agenda and took the lead for the Startups and Education portions of the event.

A4. CROSS-CUTTING ACTIVITIES TO SUPPORT IMPLEMENTATION

A4.A. Workforce and Innovation

Activity 1. Strengthening workforce development through different educational approaches

The USAID Moldova 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).

Using the Problem Based Learning (PBL) approach to enhance workforce development objectives. The Project supports the initiative of Technical University of Moldova (TUM) in shifting the current professional education approach, by implementing a Problem Based Learning approach. Problem Based Learning (PBL) is a teaching method where students gain knowledge and skills by working for an extended period of time to investigate and respond to an engaging and complex question, problem, or challenge from present in the industry. PBL guides the student from theory to practice while solving these industry-related problems. This is the first from a range of activities aimed at changing the TUM educational approach while providing direct professional training to solve complex issues based from real economy and development perspectives and of relevant professional skills for labor market.

In this context, the Project supported participation of representatives from Design Industry Departments of the Technical University of Moldova by conducting training on Problem Based Learning. This event was organized from January 19-22, 2016 and also included a study tour visit to Aalborg University, Denmark in February, 2016.



Photo credit: Valeriu Podborschii

Photo caption: Visit of Aalborg University, Department of Architecture, Design and Media Technology with Problem Based Learning Approach on February 7-13, 2016 (from left to right: Marianne Stokholm, Professor, head of Department of Architecture, Design and Media Technology, Aalborg University; Maxim Vaculenco, Deputy of Industrial and Product Design Department, TUM; Viorel Bostan, TUM Rector; Claus Monrad Spliid, Aalborg University representative.

The Aalborg University was selected for their education curriculum entirely based on PBL. The goal of the study tour visit was to compare 2 approaches: 1) Moldovan traditional curricula and 2) PBL curricula from Aalborg University. The study visit incorporated a

discussion regarding the revision of curricula in line with the PBL approach. As a result, TUM considered creating a new specialty within the Industrial and Product Department that will be entirely based on the PBL educational approach.

Problem Based Learning, as implemented at Aalborg University, requires specially equipped space called the “making-area.” This is the main focal point of workforce development within the University, where theory is combined with practical study. The idea of the making area will be replicated by TUM within the Design Lab, which will be supported and implemented with community involvement. The USAID Moldova Competitiveness project will support the TUM in their creation of the Design Lab to implement modern approaches in the workforce development sphere.



Photo credit: Valeriu Podborschii

Photo caption: Making Area Department of Architecture, Design and Media Technology, Aalborg University (from left to right: Claus Monrad Spliid, Aalborg University representative; Maxim Vaculenco, Deputy of Industrial and Product Design Department, TUM; Viorel Bostan, TUM Rector)

Supporting the wine industry by strengthening the workforce development VET education system. In order to support the wine industry by increasing the production of high quality wine, it is important to have an education system that develops a high quality workforce. There are 2 universities (Technical University of Moldova and Agrarian State University) and 3 VET institutions (National College of Vine and Wine from Stauceni, Professional School from Nisporeni, and Professional School from Leova) that develop the wine industry’s workforce.

As the Ministry of Agriculture and Food Industry makes plans to provide direct investment to the National College of Vine and Wine from Stauceni, it will be crucial for the government to assess and take into consideration the current situation of other VET institutions that have benefited from direct investments from the European Investment Bank in its decision-making process. However, the general strategy on capacity building of an educational system that supports the sector of wine industry has not been defined yet.

In February, a pilot to monitor VET institutions was launched in the Professional Schools from Nisporeni and Leova to develop investment and strategic approaches for the educational system. The findings will hopefully serve as a basis for further investments and development of new educational approaches.

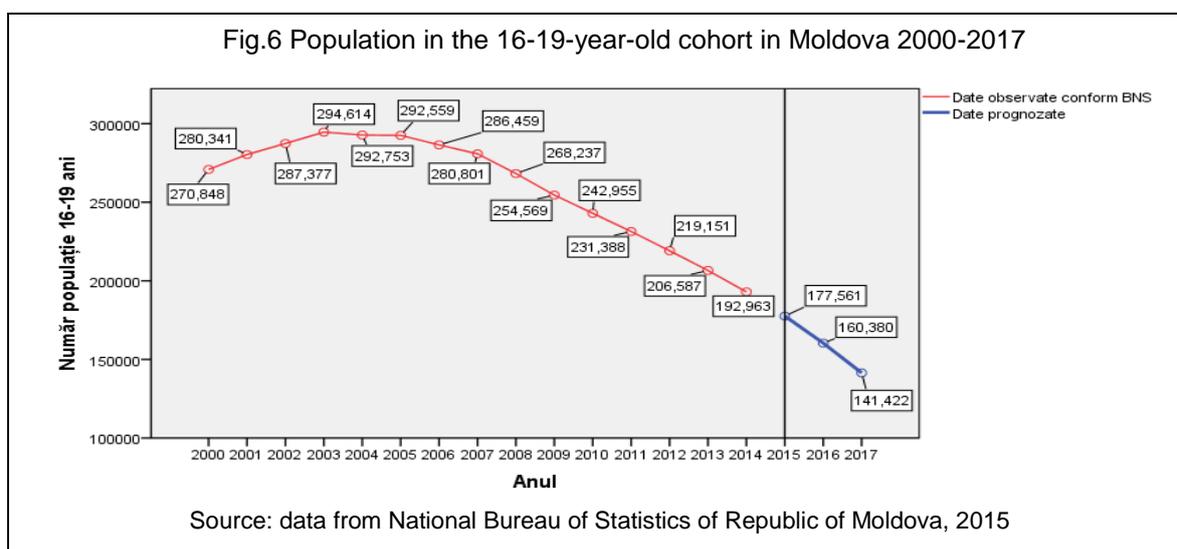
Strengthening workforce development in the light industry through the establishment of international joint programs. In order to strengthen workforce development in the light industry, the Project decided to support the TUM, an institution that prepares higher education for the following key professions in the light industry: (designers, pattern makers, and technicians. in the light industry. Due to the fact that Italy is recognized as one of leading countries in fashion design, during the reporting period, the Project focused on establishing joint degree programs with several Italian Universities for Fashion Design and with universities that provide short term courses for professionals to increase their qualifications in the field.

In regards to Fashion Design, the Project facilitated communication between TUM and Italian Universities that provide training courses for students and for professionals from the light industry. The Project identified Fine Art Academy de Como for joint degree program for fashion design as a counterpart; an institution that has been officially accredited and reorganized by Ministry of Education of Italy. The following short term courses were identified for light industry professionals with the following Universities: Plimoda - International Institute Fashion Design & Marketing, European Institute of Design, SMR - San Sepolcro, Arezzo, and Secoli University. The project is planning to support the TUM by finalizing agreements with the aforementioned universities in order to develop continuous collaboration. Further TUM will administrate by itself the relationships with Italian Universities, thus supporting the development of high quality workforce.

Activity 2. Skills Gap Analysis for Light Industry, Wine Industry, and Tourism

Professional skill gaps still remain one of the most pressing challenges to competitiveness enhancement. It has a particularly significant impact on development potential in the light industry, tourism and wine industry—both in terms of quality and quantity of the workforce. In this context, the Skills Gap Assessment activity aims to identify gaps in particular industry-relevant skill-sets that undermine current performance and competitiveness within the industries.

The assessment started in December 2015 and entered into the final stage in March 2016. The Skills Gap Analysis was carried out in several stages: initial focus group discussions, in-depth interviews with representatives of industries, surveys of selected companies, and analysis of data and formulation of findings and recommendations. During this process the job roles for analyzed industries were defined and the set of professional skills were listed. In depth interviews and the survey of companies was carried out by Magenta Consulting Company. The process of data analysis and formulation of findings and recommendations



was carried out with the participation of technical experts from JAA, Kevin Murphy, President, J.E. Austin Associates, Inc., and Karen Isahakyan, from J.E. Austin Associates, Inc.

The Skills Gap Analysis revealed that “Moldova is unique in its ‘demographic collapse’-- Moldovans coming of age have now fallen to only 35,000 per year meaning [there is a] need for only 25,000 new jobs/year.”

In the analysis, demand and supply in terms of quantity and quality of labor was analyzed for each industry. The quality was measured based on a scale from 1 to 5. Each job role from the vine and wine, tourism, and apparel industry were assessed. As a result, job roles most susceptible to high turnover were identified in order to better define job roles most in need of continuous education courses.

Overall, the Skills Gap Analysis revealed the following:

- Moldova has faced a succession of economic blows: global recession, Russian sanctions, Ukraine instability and recently the banking sector collapse;
- Many firms face the new challenge of "selling west": Russian sanctions and CIS downturn mean firms must now "sell west"-- this is a blessing in disguise but it is hard;
- The reorientation of exports to west coincided with banking sector difficulties, when the access to loans is limited or accessible at very high rates;
- Multilateral and bilateral assistance is urgently needed to enabling market connections, investment and technical upgrading in this one-time historic economic transition.

**Text Box 10. Statement
on jobs creation in
Moldova**

“Creating 25,000 decent jobs is a manageable challenge. More labor will be available if attractive jobs can be created; labor is not the main constraint to economic growth as labor force participation is extremely low”

*Kevin Murphy,
JAA President*

At the same time, the prognoses for each analyzed industry is as follows:

- Tourism has brighter prospects than most Moldovans now imagine, since outdated Soviet era statistical methods understate tourism's current and future impact on the economy;
- Vine-and-Wine hold great promise but bulk sales to east must go to bottled sales west requiring investment not only in new varieties and machinery but also new skills;
- Apparel exports continue to be viable although salaries will be limited; these industries are to be encouraged on the way to export higher value added products.

The experts came up with the following set of recommendations that could support the process of workforce development and increase competitiveness:

- Intensive training in cross-industry marketable skills: intensive language, mini-MBA, IT/Social Media, problem solving and communications pilot program at IT Centre of Excellence "Techwill."
- Industry-specific and industry-led training initiatives supported.
- Improvement of the traditional education and training providers using the "10 Bridges" approach.

Activity 3. Development of Preliminary Concept Note on Design Lab within Design Industry Department, TUM

In order to support the Technical University of Moldova (an industry-specific workforce development institution), the Project helped create ZIPhouse, a program that focuses on strengthening professional connections within the light industry while Tekwill focuses on strengthening connection within the ICT sector. Currently, the Project started to support

the development of Design Lab aiming to develop a design thinking culture with newly developed workforce. From an infrastructural point of view, Design Lab is going to connect ZIP house with Tekwill and will facilitate the process of interaction among different groups of professionals to stimulate creative thinking.

During the reporting period, a preliminary Conceptual Note on Design Lab was developed. The analysis assessed infrastructure and construction needs as well as planning of spaces for different activities with Design Lab in order to compile a preliminary list of equipment needed for the Design Lab activities. This information will serve as the basis for the development of an MOU with TUM.

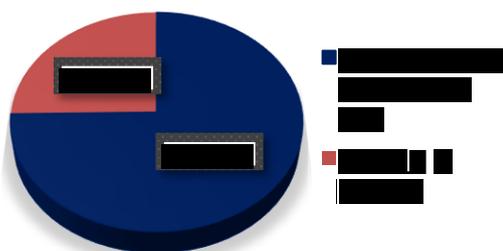
The Project identified a team of young professional interested in supporting the “making area” of the Design Lab. with the vision that this team will represent the administrators of Design Lab in order to increase opportunities to create an atmosphere of creativity, interaction, and community involvement.

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

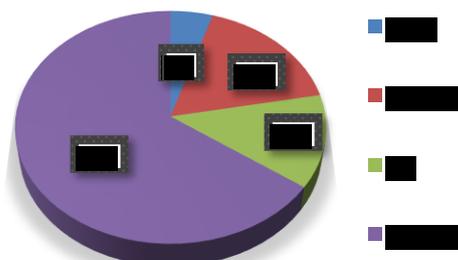
During the quarter, SEED Fund transitioned to the implementation phase of the \$ [REDACTED] SEED Fund by issuing the following three Request for Applications (RFA) with a total value of \$ [REDACTED]:

1. RFA-2016-001 for strategic business associations in key sectors to improve their organizational capacity to position them as sector leaders and to support implementation of key activities focused on competitiveness with an estimated value of \$ [REDACTED].
2. RFA-2016-002 for rural pensions and handicraft centers in two main wine areas Codru (Central Moldova) and Ștefan Vodă (South-East of Moldova) to support them with the diversification and improvement of their services to better position Moldova as an attractive tourism destination. The funding opportunity, with an estimated budget of \$ [REDACTED], was advertised on several websites including National Association for Inbound Tourism’s (ANTRIM) website, civic.md, as well as emailed directly to various potential grantees identified by a local consultant.
3. RFA-2016-003 for micro, small, medium and large companies in the light industry sector aimed at enhancing their productivity, improving the quality of their merchandise and accessing new markets with a total value of \$ [REDACTED]. The RFA was published on APIUS’ facebook page and on civic.md website.

Q2 FY 2016 - SEED Fund Performance



Committed Funds by Industry (issued RFA)



The Fund held round table meetings with potential beneficiaries under all issued RFAs to better explain the grants program, required documentation, and specific rules and regulations to USAID funding. The Project received the first three applications under RFA-

2016-001 for business associations, which were reviewed by the SEED Fund. Per the approved Grants Manual, a Selection Committee (SC) meeting was organized and made up of three members with voting rights – Project COP and two technical leads from the ICT sector - as well as members of the SEED Fund, USAID COR, and two technical leads from the tourism and light industries. Members with voting rights signed the certification regarding conflict of interest and the entire SC process was documented in meeting minutes prepared by the SEED Fund Manager and signed by all present members. The remaining business association applications and additional RFA for light industry are expected in April 2016.

Also in March, the Project received applications from interested businesses in the tourism industry. The SEED Fund is currently working on conducting the preliminary review of the applications to ensure they are complete and the applicants comply with all the eligibility criteria listed in the RFA.

Furthermore, the SEED Fund Manager has been working with USAID and home office environmental experts on reviewing the new Initial Environmental Evaluation (IEE) that will address Project related activities. Following the completion of the IEE, the Project will submit for USAID's consideration the revised programmatic Environmental Mitigation and Monitoring Plan (EMMP), that was initially presented for approval in January 2016. The programmatic EMMP delineates the Project's environmental due diligence approach and proposes appropriate mitigation measures and monitoring protocols for activities (including construction) that may fall in the negative determination category.

A4.C. Local Capacity Building Program

In Q2, SEED team completed the Organizational Capacity Assessments (OCA) with various business associations including National Association for Inbound Tourism (ANTRIM), Employers Association of Light Industry (APIUS), Association of ICT Companies of Moldova (ATIC), and Association of Small Winemakers (ASW). Following the evaluations, the capacity of the associations was found to be quite low, with an average capacity along all capacity criteria of 1.9 out of 4. Three of the Associations did not exceed the average of 1.68 out of 4. The assessments resulted in Capacity Development Plans (CDP), that were signed by each entity and that delineate planned interventions in gap areas such as governance, advocacy, and communication, among others. The next quarter will mark the beginning of specific project to start the recruitment process for governance and marketing/communication specialists to guide the associations and work with them to design tools and procedures that will lead to knowledge institutionalization and improved services.

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

The project aims to increase access to finance for companies from targeted sectors and to support financial institutions to enlarge their portfolio of clients with start-ups, women entrepreneurs, and other categories with limited access to financial resources. By increasing the availability of credit to companies from targeted sectors, the project contributes to private sector competitiveness—a pillar for economic growth.

With an initial start in September 2011, the project continues to serve as an assisting partner within the DCA activity; and is currently being implemented in partnership with two financial institutions, Prime Capital and Comertbank. During the reported period, the USAID Moldova Competitiveness Project provided ongoing assistance to the DCA partners through regular communications; advising on applicants' eligibility for particular sector products; linking partners with USAID; consulting on contract implementation and participating in meetings focusing on increasing DCA utilization. For example, in February 2016, the Project supported Prime Capital to obtain USAID approval to allow DCA to be categorized under energy efficiency agreement No. 117-DCA-13-010. This enabled them to qualify for a loan

exceeding \$50,000 (the maximum amount of qualifying loans according to the agreement) requested by a potential borrower from rural region Orhei, whom was willing to invest in a business with energy efficiency impact.

On February 5, 2016, Ruxanda Cheibas, Project M&E Manager and Access to Finance Coordinator, conducted a monitoring visit to Prime Capital to review the DCA files for the agreement signed between Prime Capital with USAID in partnership with Sida. During the monitoring visit, loan files were verified to be in accordance with the Loan guarantee agreements including: the credit files containing documents that confirm the connection with targeted sector, the qualifying borrower, the loan applications, and the loan destination; the compliance with environmental local regulations, as well as the requirements stipulated in the DCA agreements related to environmental compliance and anti-terrorism checking; and the correct reflection of the loans in the Credit Monitoring System (CMS). The project representative didn't detect any deviation from or non-compliance with the agreement.

During this quarter, summary memos of the 3 monitoring visits undertaken by the DCA guaranteeing partners for each current agreement, were prepared and submitted to USAID.

There are 2 out of 3 current DCA agreements that have placed loans under coverage by March 31, 2016. At the same time, the economic and political situation, as well as the situation in the banking sector didn't improve and banks need support for providing long-term loans and credits to the companies with low collateral. Taking all this into consideration, in February, it was decided that USAID officials from Washington D.C. for DCA projects that will come to Moldova to make a market assessment and meet with potential partners. As result, the agenda with potential partners was developed and preliminary discussions were carried with potential financial institutions. The advantages of collaboration were explained to interested financial institutions, and discussions with local investors took place focusing on new DCA Ideas (with Red Union Fenosa – for a DCA on lighting and Starnet -for IT Park).

In March 2016, Jesse Corradi, USAID DCA Investment Officer, came to Moldova to make a financial market assessment as well as to meet with current DCA partners, financial institutions interested in collaboration, and investors interested in implementing projects that improve people's lives.

During March 2016, the Investment Officer Jesse Corradi, in partnership with USAID Moldova and Project representatives, visited the financial institutions interested in collaborating: Mobiascanca, Procreditbank, Moldova Agroindbank, Fincombank, Total Leasing & Finance, and 2 institutions with current DCA agreements – Comertbank and Prime Capital. All the meetings were organized at the top level with Presidents from each institution. All visited financial institutions had a high interest in a new DCA product and due to the difficult situation in the banking system, the institutions expressed the will to start DCA implementation as soon as possible. Financial institutions mentioned sectors that receive assistance from the Project, and highlight that the agriculture and agribusiness sector are considered to be high risk.

Comertbank and Prime Capital, current DCA implementers, met to discuss achieved results. 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 that it is initiated, Serghei Cartasov, Comertbank President, proposed enlarging the definition for borrowers to include the waste recycling industry and/or green sector, to cover energy efficiency and other sub-sectors. Prime Capital, also invited representatives from the Swedish International Development Cooperation Agency (Sida) to take part in the discussion. Prime Capital also mentioned that a new DCA to support the ICT sector will be required given the difficulty in the banking sector, and possible reduction of low collateral of borrowers receiving assistance in ICT sector.

In this preparatory phase for initiating a new Development Credit Authority (DCA), one of the preliminary steps was the request that all financial institutions submit their Financial Institution Baseline Data Form. The baseline data will be used to track the impact of the agreement on the financial institution's lending practices. These forms have been completed by the financial institutions and submitted to Jesse Corradi, USAID DCA Investment Officer.

USAID DCA Investment Officer, Jesse Corradi, participated in the meetings organized by the USAID Moldova Competitiveness Project with several companies in order to expand DCA applications. In this respect, a meeting with top management of Gas Natural Fenosa company (electricity distributor) was organized to discuss the DCA mechanism and the possibility to involve DCA for upgrading street lighting (installing lights, switching to LED bulbs for energy efficiency, etc.), by engaging Local Government, Gas Natural Fenosa (electricity distributor) and local businesses through financial/operational leasing.

Another meeting was organized with a leading IT company, Starnet Group (Internet Services Provider) that is interested in the creation of an IT Park named Digital City where project implementation could be achieved through the DCA implementation process. The IT park is critical for Moldova's IT industry competitiveness. It will create an ecosystem, both in terms of physical infrastructure and community for technology businesses in Moldova, which is currently lacking. The IT Park is expected to host over 50 IT businesses, and will contain a strong innovation element, through building community, startups and education. It will set the foundation for a Moldova IT cluster. The discussions for the IT Park were also held with visiting financial institutions that could offer loans guaranteed through the DCA mechanism.

As result of the visits, Mobiasbanca was the most interested to engage in the IT Park project and could provide the loan with additional resource backing from Groupe Societe Generale. As a result, on March 21, 2016, the project conducted a visit to the future Digital City location with Mobiasbanca's top representatives, during which the project was presented to the bank. The bank informed the project of its requirements for future collaboration, while the Project presented the DCA mechanism.

B. DELIVERABLES

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

Deliverable Name	Submission Dates
Quarterly Report, January-March 2016	April 14, 2016
Monthly Report, January 2016	February 15, 2016
Monthly Report, February 2016	March 15, 2016

SECTION II

RESULTS AND IMPACT

A. QUANTITATIVE RESULTS

A1. Monitoring & Evaluation

General. The project is designed to have a strong impact on project beneficiaries, and to provide assistance to 450 companies during the life of the project. Thus, a comprehensive M&E data tracking system should be used to track all the activities related to the project.

The project decided to locally develop the database since Chemonics has already implemented other competitiveness projects (USAID CEED II Project) in the past for which a performance M&E database was created. The current USAID Moldova Competitiveness Project has many indicators that are similar to those from the past project. At the same time, more than half of project employees have been trained to make entries there. A complex database, time saving and costs saving, are the main reasons for updating the previous database.

In February, when the Project server was installed and became functional, the past M&E database was tested and the M&E Manager, Ruxanda Cheibas, started to work on the elaboration of the requirements for a database update. At the same time, having elaborated all templates and forms for the monitoring process, the sector managers kept elaborating and signing Memorandum of Understandings with the beneficiaries and partners.

During the quarter, at USAID's request, the Performance Indicator Sheet (PIRs) attributable to the USAID Moldova Competitiveness Project has been updated by the Project, and a Performance Indicator Sheet was developed for a new indicator "Increased number of market linkages established with USG assistance". For the purpose of the indicator, the market linkages were defined by the Project as any agreement, formal or informal, entered into by the assisted enterprise(s) with an existing and/or new client, as a result of USG assistance, leading to expanding sales for the assisted enterprise(s). USG assistance may include any direct and indirect marketing-related support, such as participation or exhibition at trade shows, business-to-business (B2B) and business-to-consumer (B2C) events, brand development, internet promotion, etc. This information was requested by USAID in order to update USAID/Moldova PMP.

Inclusive Development. All the USAID Moldova Competitiveness Project activities use a non-discriminative approach and aim to increase inclusiveness.

In this respect, the Project collaborates with companies from all of the country's regions, including Gagauzia and Transnistria. The Project also designed activities that include groups that have been historically excluded or disadvantaged, especially women and youth.

During this quarter, two companies from the wine sector in Gagauzia have participated in Project activities. Vinuri de Comrat was audited within the PQUP initiative and a development plan was developed aimed at quality improvement by Project's and ONVV's joint team of experts. After the audit, Vinuri de Comrat will be eligible for direct assistance through the SEED fund for the implementation of the quality improvement plan. Another company—KKara Gani—benefited from the joint activity with the Association of Small Winemakers by being identified as a prospective new small wine producer. Kara Gani will now be eligible for direct support through the SEED Fund for production capacity development and improvement of touristic facilities.

In the light industry during this reporting period, the Project assisted 2 apparel companies from Transnistria to participate at international exhibitions in order to attract new foreign clients. Odema JSC was approached to participate at the Premier Vision exhibition and Textileprom, while Intercentre Lux, Dubasari participated at the CPM exhibition. Intecentre Lux, Tiraspol participated at the Fashion Central Asia Exhibition to attract new clients for products produced under its own label. Two footwear manufacturers from Transnistria, Floare and Tigina, were also encouraged to participate at two specialized exhibitions: Leather& Shoes and GDS, Dusseldorf. As a result, the companies established 59 new contacts, while Intercenterlux signed contracts valued at \$1,650,000.

The Project offered technical assistance and support to Design and Technology Excellence Center ZIPhouse, a current platform for students, young designers, start-up companies, as well as professionals from the light industry. From more than 220 ZIPhouse participants at the events organized during this Quarter, 153 are women (70%) and 130 are youth (59%). The activities aim to stimulate creativity and entrepreneurship in the fashion industry to develop needed technical skills and abilities to become a professional and to succeed in this field; to build a strong community for co-working on new projects; and to create favorable environment for collaboration between students, teachers, professionals and employers in the light industry.

In the ICT sector, the project designed activities have a positive impact on youth. During the reporting period, a skill gap assessment to plan university education improvement was conducted and the results will be presented in April at the ICT Summit. Additionally, the Project supports learning initiatives in the ICT sector through Robotics programs in 8 schools by providing robotic kits and included in the Roboclub program. The extension of educational robotics to six schools outside Chisinau allowed 116 students (of which 84 from outside Chisinau) to be exposed to modern education methods and attend the robotics clubs free of charge. Three informatics teachers from the eight new institutions are women.

The project also supported the organization of a national competition on Robotics where His Excellence, James D. Petit, Ambassador of the USA in Moldova, and the Deputy Minister of Education, Elena Cernei, were present at the award ceremony. As initially it was envisioned that only one winning team would travel to Estonia for the international competition, the available funding was insufficient for two teams. As such the USAID Moldova Competitiveness Project helped them with a fundraising campaign. The participation of the Moldovan teams at FIRST® LEGO® League Estonia was very successful. The international jury of the competition awarded them 1st place trophy for "Robot Design, Strategy and Innovation category" to the team RoboRangers and 1st place trophy for "Teamwork" - to the team RoboJunior. The Moldovan Robotics teams were invited later on to compete at FIRST® LEGO® League Open European Championship 2016, which will take place on 04-07 May 2016 in Tenerife, Spain, among over 90 teams from 50 countries.

A2. Progress towards quantitative indicators targets.

The table below 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.

Table 4. Performance Monitoring: Targets versus Actual

Performance Monitoring: Target vs. Actual					
Indicator	Target Established Y1	Actual Achieved Q1 - Y1		Actual Achieved Q2 - Y1	
		in the quarter	in the quarter	in the quarter	cumulative
Project Purpose: Grow and Expand Targeted Competitive Industries					
1	Value of domestic and export sales in targeted sectors	N/A	Data reported annually	Data reported annually	Data reported annually
2	Increased value of sales facilitated on behalf of assisted enterprises	\$ 20 M	Data reported annually	Data reported annually	Data reported annually
3	Value of new private sector investment in assisted enterprises	\$ 8 M	Data reported annually	Data reported annually	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	74	179
5	Assisted enterprises applying improved knowledge, processes, and technologies	60	25	72	97
6	Assisted enterprises following recognized product or process standards	10	1	5	6
7	Individuals receiving job skills aligned with industry needs	3,000	447	347	794
8	Percentage change in specified productivity measure (sales per employees)	+2%	Data reported annually	Data reported annually	Data reported annually

Indicator		Target Established Y1	Actual Achieved Q1 - Y1	Actual Achieved Q2 - Y1	
Objective 2. Expanded Market Linkages					
IR 2.2: Improved Private Sector Competitiveness in Selected Industries					
Sub-IR 2.2.2: Expended Market Linkages					
9	Number of enterprises with sales facilitated through USG assistance	50	59	25	84
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	Data reported annually	Data reported annually
11	Financing accessed by assisted enterprises	\$ 600,000	Data reported annually	Data reported annually	Data reported annually
12	Number of assisted enterprises in targeted industries with increased investment	20	Data reported annually	Data reported annually	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	2	3
14	Number of Public-Private Partnerships established	5	-	1	1
15	Value of Public-Private Partnerships established	\$ 300,000	-	9,200	9,200
16	Improved capacity of local institutions	+10% over baseline	Data reported annually	Data reported annually	Data reported annually
17	Project-assisted public-private sector dialogue platforms conducted	4	1	1	2

B. QUALITATIVE RESULTS

B1. Wine and Tourism Industries Results

- 5 new small winemakers were identified – As a result of collaboration with ASW under the “ASW Mentorship program” 5 new small winemakers’ were identified whose project were qualified as having a high potential both in becoming sustainable wineries and as potential wine tourism sites
- 12 companies have been audited for the PQUP program - The joint team from ONVV and the Project’s short term expert have visited and audited 12 wineries in transition and have identified the drawbacks of viticulture in winemaking that impeded the audited wineries to produce quality bottled wines with higher added value. Based on this audit a tailored development plan will be elaborated.
- 30 wineries participated in Prowien 2016 –In participation with a national booth under the Wine of Moldova umbrella, another contract was signed.
- 45 samples submitted to 4 international wine contests with USAID support. – The Project has developed an incentive program to enlarge the number of submitted samples to the most renewed international wine competitions. Forty-five wines were submitted through this program with the project’s direct support, with a total number of samples exceeding 90 pieces.
- 10 out of 22 submitted samples by ASW members to Berliner wine trophy have received medals - The project supported the participation of 22 wines from small wine producers to the Berliner Wein Trophy, out of which 10 wines achieved remarkable results, winning gold and silver medals.
- 5 times increase in the coverage of the wine friendly program – The social media campaign generated over 500,000 individuals during the second wave of the wine friendly program, which represents 5 times as many individuals compared to indicators from the previous wave.
- 14 new sommeliers have received European accreditation - During February 2-February 15, in cooperation with Association of European Sommeliers and due to the enthusiasm and efforts of Mrs Brigitte Leloup, 14 professionals from hospitality services have attended the coursework and passed exams for ASE accreditation.
- 20 wineries were selected for evaluation to provide tourism services - The Project contracted a wine tourism specialist, Diana Isac, to make recommendations and evaluate the wine tourism products, facilities, soft skills of the guides and sommeliers. Ms. Isac selected a final list of 20 wineries from Codru and Stefan Voda wine regions to be evaluated. While the evaluation has begun during this reporting period, the final reports and recommendations will be provided by mid- April, as a supporting entity for the wineries grants program.
- 20 rural pensions and 10 tourism facilities from wine regions evaluated- The Project supported the evaluation of 20 rural pensions and 10 local tourism facilities in the targeted regions, Orheiul Vechi, Ivancea, Clisova noua, Ialoveni, Milestii Mici, Costesti, Anenii Noi, Causeni and Purcari. On February 16th, the project launched the Grants program and received 26 applications in which beneficiaries will be selected in April.
- 2 new German and Polish tourism routes to be developed. The Project has contracted the Guides, Lecturers and Translators Association to develop two thematic tourism routes based on the Polish and German roots in Moldova, highlighting the importance of these two ethnic communities in the country in hopes to add value to Moldova’s tourism sector.
- 15 MICE Tourism companies and service providers participated at specialized workshops. In February, Harry Fine, MICE expert from the UK, has undertaken a three-day workshop with the local DMCs, event management companies, hotels and conventions centres, and wineries. Given that the main outcome of the workshop is to develop the MICE tourism roadmap to markets, the main elements were drawn,

including unique selling proposition, positioning, differentiating elements, key competitiveness advantages, and main segmentation of the Moldovan MICE product offer.

- 4 Moldovan companies showcased for Dutch market - In January, Tatrabis and Amadeus Travel tour operators, along with Cricova and MIMI wineries, participated at the largest travel exposition Vakantiebeurs in the Netherlands. There is growing interest in the Moldovan tourism sector and as such, existing partners actually extended tourist groups planned for 2016-2017 to accommodate new partners that expressed interest in including Moldova in joint regional tours, e.g. with Romania.
- 3 tourism companies, 3 wineries, and 1 association participated at the Romanian tourism exposition - This February National Tourism Agency, in partnership with ANTRIM and USAID support, Tatrabis, Solei Turism, BT Travel, Cricova, Asconi and Chateau Vartely wineries, participated at the Tourism Fair in Bucharest, Romania. There is growing interest in the Moldovan tourism offer from neighboring countries, especially in wine tourism. As such, ANTRIM, has established partnerships with the inbound Association from Romania and is planning to organize the first incoming forum in Moldova in Fall 2016.
- 8 Moldovan companies and 1 association participated at ITB Berlin tourism exhibition - During March 9-13, the 50th edition of ITB Berlin Tourism exhibition took place. The Project offered strategic support to the Tourism National Authority and ANTRIM to co-organize the participation at the highest level. The participating companies TatraBis, Amadeus Travel, Moldova Tur, BT Travel, Ways Travel, Solei Turism, Air Moldova, Berd's Design Hotel and Asconi Winery, had an opportunity to meet with potential partners and customers. The general promotion was focused on Wine tourism given that the main tourism product is wine.
- 10 foreign tour operators to visit Moldova for familiarization tours - These proved to be a very efficient way of business expenditure and new market penetration and partnership-building, to extend the existing tours as well as develop and launch new products. The Project co-financed the visit of tour operators from target markets for the biggest tour- operators. Ten foreign tour operators will visit Moldova in individual familiarization trips, including: Lumian Ky, Go Barefoot, Biblische-reisen, Asteria Expeditions, Redo Travel & Incentive, Grupa Trip, Discovery Travel, Noble Caledonia, VTB Reizen TUI, and World Theme Travel Company. The intended outcome is for the foreign operator to begin booking tours to Moldova.
- 10 local cultural-tourism events to be supported. Between March 1st and March 31st, the application phase within the Program "Tree of Life" took place, which aims to support cultural -tourism events. This program intends to highlight the value of traditions; to promote local cultural and artistic events; and to position the Republic of Moldova as a tourism destination locally, regionally and internationally by increasing the visibility of local events that aim to develop existing tourism potential. As a result, 102 applications were registered, while 10 events will be selected to receive support and consultations on demand, in order to increase the visibility of the event, cultural tourism, and regional expansion at the international level through promotion and awareness-raising.

B2. Light Industry Results

- Five small apparel, footwear, and fashion accessories companies (Olga Ceban, Vistline, Zivaz Maxi, Oldcom and Bit Program) successfully implemented the innovative methods for workplace organization. - As a result, the losses of time were reduced by 5-8%. Better work place organization, flow organization, and introduction of rationing of manufacturing operations based on MODAPTS method allowed productivity to increase by 15-25%.
- In Premiere, sixteen apparel companies (Intercentre Lux, Odema, Infnitextil, Portavita, Ionel, Steaua Reds, Mobile, Saltoianca, Premiera Dona, Artizana, Ludmila Storojuc,

EHO, Aller&Co, Natalia Melnic, Ionel, Nikita Rinadi) successfully participated at 5 international exhibitions (CPM, Textilegprom, Fashion Central Asia, Red Carpet and Premier Manufacturing) under the Din Inima umbrella brand. As a result of participation at these exhibitions, 124 new contacts received testing orders in the total amount of \$77,000, and signed contracts in the total amount of \$2,137,000.

- Six local brands (Georgette, Iulia Allert, Secana, Katea Gri, Premiera Dona and Ionel) opened a new common store in the center of the city on the main street of Stefan cel Mare. The total investment in the common store constituted more than \$55,000, 90% of which comes from private investment. The sales of the first month of all brands constituted more than 350,000 MDL.
- Four designers from Apparel Companies (Mobile, Allert&Co, Raquete Group and Natalia Melnic) that produce and sell under their own label participated at Premier Vision and Texworld international exhibitions. They had the opportunity to select raw materials for their collections for next season. A group of 16 designers and acquisition specialists from 14 apparel companies visited 14 stocks of raw materials and accessories in the Prat region of Italy and contracted raw material for future collections valuing over 100,000 Euro.
- Three Moldovan hand-made fashion accessories manufacturers (Ju-Bijoux, Marinelle, and Natalya Maskvina) exhibited at the B2B trade fair Bijorhca 2016 d in Paris. Participation at this important trade platform has broken the ice for new markets. As a result, the brands have obtained 44 contacts from all around the world - United States, Japan, Spain, France, Italy, Belgium, Spain and other countries. Buyers were able to place trial orders in the total amount of \$17,700. Several buyers commented on being impressed by the high quality of the jewelry design and style.
- Nine footwear and leather accessories companies (Oldcom, Cristina, Tiras, Hincu, Floare, Tigina, Zorile, Batistrada and Vitalie Burlacu) participated at the GDS Trade Fair in Dusseldorf, Germany. The GDS fair took place during February 10-12, 2016. As a result of GDS participation, footwear and leather accessories producers have contacted 66 entities for potential collaborations with buyers from EU and Russia, including large retailers and suppliers of raw materials.
- A total of 23 local brands participated at Fashion Days event, split in 2 catwalk shows. With APIUS, the USAID Moldova Competitiveness Project and organizer's common efforts an impressive PR vibe has been created, with more than 40 appearances in mass media presenting and commenting this fashion event. The event reached 150 000 visualizations while being retranslated online.
- Advertising spots for 11 brands (Georgette, Sekana, Miss Vivien, Irka Shoes, Mallena, Ana Popova, Crème Brulee, Artizana, L'ame de femme, Vitalie Burlacu, Feodora) have been placed on 4 led screens to be run during April.
- More than 220 participants in total benefited from 7 workshops and seminars and 4 community building events organized at ZIPhouse. As a result, 17 professionals from private companies improved skills and knowledge related to fashion topics, and 7 teachers improved skills in Pattern Making&Grading. ZIPhouse's earnings for this period represent 58 000 MDL.

B3. Information and Communications Technology Industry Results

- Educational Robotics program has been expanded to eight new schools, of which 6 are located outside of Chisinau. This opens new opportunities for students to be exposed to modern education methods.
- The participation of Moldova in the FIRST LEGO League program was very successful. This contributed to the increased awareness and interest toward educational robotics initiative, as well as advocated for future careers in IT and engineering.
- Ten companies are supported by the project in the German Market Entry Coaching Program. The IT companies initiated the German market entry certification process.

B4. Cross-Cutting Activities Results

Workforce and Innovation

- Skills Gap Analysis for the vine and wine industry, apparel industry, and tourism in the Republic of Moldova was performed. The Skills Gap Analysis identified the level of competence for each job role, demand and supply in term of quantity, job roles that are the most subject to high turnover, and job roles most in need of ongoing education. The report provides arguments that support the statements regarding perspectives for future development of industries from the analysis. The report contains recommendations regarding the improvement of the current situation, both in terms of revision of educational programs and strategic direction of development for industries.

Sector Engagement, Enhancement, and Development (SEED) Fund

- Three RFAs with a total value of \$ [REDACTED] were issued by the Project. Q3 of FY 2016 will mark the kick-off for the awarding period of the Project.
- All OCA assessments for four business associations were completed in all sectors supported by the Project and Capacity Development Plans (CDP) were developed.

Development Credit Authority Activity

- Ongoing assistance to USAID DCA current Guarantee Partners was provided. The Project started the communication with and provided advice to financial institutions implementing the DCA activities.
 - The financial institutions implementing current DCA agreements have increased the utilization amount: During the reporting period, Prime Capital has placed under guarantee the following:
 - DCA # 117-DCA-11-009 (in ICT, women entrepreneurs and youth) – 4 new loans valued at \$78,000 with total cumulative utilization valued at \$1,029,170 or 87.74% as of March 31, 2016 and DCA # 117-DCA-13-010 (in energy efficiency) – 2 new loans valued at \$105,000; the total cumulative utilization valued at \$433,166 or 12.28% as of March 31, 2016.
 - In respect to Comertbank, DCA # 117-DCA-11-008A, the bank placed under guarantee: 4 new loans valued at 1,218,000 MDL (approximately \$62,000). The total cumulative utilization in dollars and as percentage will be available by the end of April.
- A monitoring visit to Prime Capital for the energy efficiency agreement # 117-DCA-11-009 was organized. The visit was organized in order 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.
- Tree monitoring memos in respect to ongoing DCA agreements were prepared and submitted to USAID. The monitoring visits were organized between December 2015 and February 2016. The monitoring memo for Prime Capital for the energy efficiency activities was also presented to Sida, the USAID partner for this DCA agreement. As result, a joint meeting with USAID, Sida, and Project representatives took place at the Prime Capital office while the financial institution presented results.
- Seven financial institutions interested in implementing DCA agreements were identified and discussions have been initiated. Within the market assessment undertaken by DCA Investment Officer from Washington, Jesse Corradi, the Project organized visits to the financial institutions that, within preliminary discussions, showed high interest to sign DCA loan portfolio agreements. Their interest was confirmed during the meetings.

- The process for launching a new DCA program with financial institutions was initiated. All financial institutions interested in signing a DCA agreement with USAID received and completed the Financial Institution Baseline Data Form, requested by USAID, marking the preliminary steps for designing a new DCA activity in Moldova.
- New areas for enlarging the DCA applicability in Moldova were researched. The project organized several meetings with top management officials from the Gas Natural Fenosa company (electricity distributor) to discuss the DCA guaranty mechanism and the possibility to involve DCA for upgrading street lighting (installing lights, switching to LED bulbs for energy efficiency, etc.) by engaging local government, Gas Natural Fenosa and local businesses through financial and operational leasing. Also, meetings with a leading IT company, Starnet Group (Internet Services Provider), interested in the creation of Digital City IT Park were organised with the possibility of implementing the project using DCA guarantee.
- The Project identified a bank interested to engage in IT Park project, using the DCA guarantee mechanism. The Project discussed with several banks the possibility to use DCA guarantees for IT park project implementation. Finally, the Project decided that Mobiasbanca has the capacity to engage in the IT Park project. As result, a field visit to the future Digital City location was organised for Mobiasbanca top representatives, where they met with Starnet top management and preliminary discussions were initiated.
- One meeting with the European Bank for Reconstruction and Development (EBRD) was conducted in order to identify the options and feasibility for financing the IT Park project implemented by Starnet company. EBRD expressed its openness to continue the communication on defining the investment proposal to finance the IT Park.

C. COMMUNICATION

General. Throughout the reporting period, the Project managed to have elaborate on its PR & Communication strategy, establish collaborations with strategic media partners, and finalize selection of a PR and communication company to serve as the Project press office.

In respect to the Project PR and communication strategy, the local communications consultant, Andrei Cibotaru, delivered the final strategy in February 2016, which addresses the objective of having an efficient and streamlined communications plan related to USAID funded activities. The document contains the key objectives, messages, target audiences; and media outlets to use, and also recommends activities and events to generate awareness and the type of media/PR/communication products to use. A workshop was organized on March 25, 2016 to present the strategy to the Project team. During the meeting, the consultant also presented the best practices related to PR & Communication, awareness tactics, and press work.

Aiming to increase the visibility of the implemented activities and following the recommendations of the local communications consultant, in mid-February 2016 the Project started to collaborate with four media agencies: Interact Media (for agora.md and ea.md), Miraza (unimedia.info), Onixmedia (diez.md), Zingan (for allmoldova.md). The Project negotiated win-win contracts that ensure discounts for the contracted services (video, interview, etc.) of up to 60% or/and pro-bono services.

Having established basic partnerships with local media, the next step initiated by the Project as part of its PR & communications plan was the development of the Request for Quotes (RFQ) for contracting a local PR & Communication company, to implement the strategy and to act as the Project press office. According to the RFQ terms, the service provider should develop a standardized "information package" for media coverage by:

- Providing copywriting services for press releases, event materials, social media posts,
- Making all necessary arrangements with media vehicles in order to ensure publications/airings of the information generated by Project activities and initiatives,
- Organizing logistics of events: press conferences, events for media,
- Managing Project media relations: inviting media, follow up of invitations, personal contact with media representatives, preparation of press kits, posting to social media profiles,
- Assisting and consulting the Project on relationships with media,
- Reporting on performed actions: social media key performance indicators, media monitoring, press clippings etc.

As a result of the RFQ, five companies submitted their offers, and three companies were invited to further discussions.

Below are the brief descriptions of the communications activities carried out during the reported period:

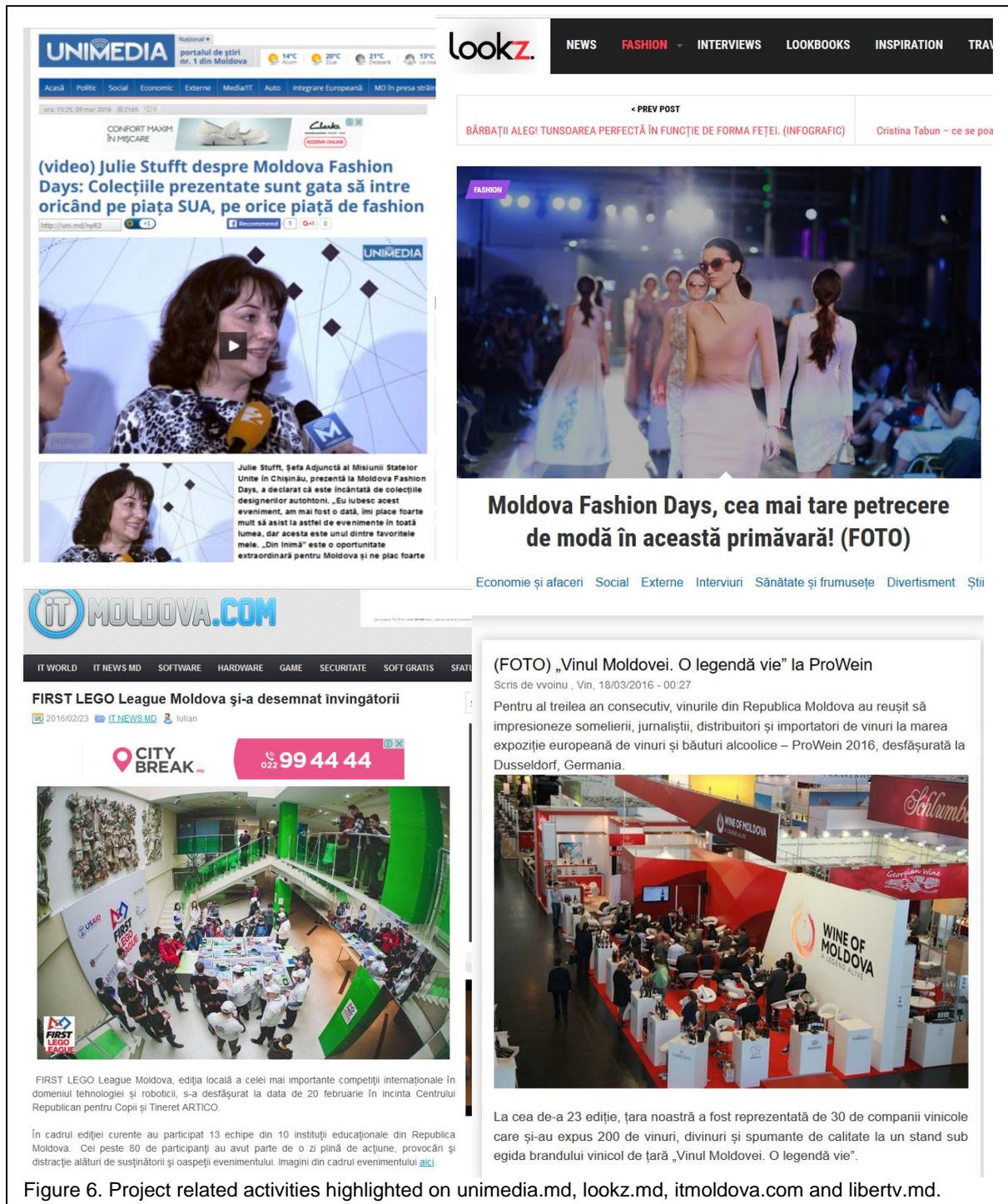
- Regular submission of monthly calendar of events to USAID.
- Elaboration and submission to USAID of the project short success stories for USAID website as well as other communications notes (grants applications, honor women day, etc.).
- Four win-win partnerships leveraging project resources were established with media partners and are ongoing.
- A comprehensive six-page article about the launch of the USAID Moldova Competitiveness Project and its targeted sectors was published in the economic magazine “Banks and Finance - Profit” and on the site www.profit.md. USAID COR Sergiu Botezatu, and Project COP Doina Nistor were interviewed.
- A five-page article on the USAID Moldova Competitiveness Project assistance to the wine sector was edited and being readied for publishing.
- Ensuring that Project branding and marking guidelines were respected during numerous technical events, as well as local and international publications and promotional activities in Project target sectors.
- Elaboration of the power point template with project logo in Romanian and English which is compliant with the USAID branding regulations, to be used for project presentations.
- Other communications related activities: outdoor and indoor boards development and installation, Printing business cards for new employees, etc.

Media coverage. In the reporting month, the project’s main public technical activities were promoted in mass media and properly branded. The related project activities were featured in more than 220 e-publications (www.unimedia.md, www.almoldova.md, www.diez.md, www.adora.md, www.moldova.org, www.realitatea.md, d, www.ea.md, www.protv.mdetc.), and highlighted on



Figure 5. The article on USAID Moldova Competitiveness Project launch published in “Banks and Finance” review

Moldovan TV channels. The USAID Moldova Competitiveness Project highlights and implemented activities and achieved results were also posted on the USAID Facebook page: four highlights related to wine industry, two in tourism, three in light industry and two in ICT.



During the reporting period, the following Project implemented activities were largely presented in mass media:

- *In ICT sector*, the largest event reflected in mass media of January 2016 project activities was the transmission of robotics sets to eight schools. The TV coverage peaked on January 13, 2016, when the TV show "Reality Today" was dedicated to

the topic "Extending ROBOCLUB Program." Project representative Ionela Titirez, ICT Education and Entrepreneurship Development Manager, was invited to discuss this activity. Another event that attracted much attention and had extensive media coverage, with over 20 publications, including reports on local TV channels and major online news portals, was the second year of the FIRST® LEGO® League Moldova robotics competition, organized in Chisinau on February 20, 2016. The successful participation of winning teams RoboJunior and RoboRangers at the FIRST® LEGO® League competition in Tallinn, Estonia in March 2016, that ended with awards - Team Work and Robot Design Cups - for both Moldovan teams, had a media coverage of 20 publications.

- *In wine sector*, during February 2016 activities, the promotion of wine culture through the "Wine Friendly" program included partnerships with four media portals which generated over 50 media hits; six infomercials featuring winemakers, restaurant owners and opinion leaders were produced and placed on social media generating over 1,500 views. Additionally, the exceptional results for Moldovan wines (10 medals) at Berliner Wein Trophy were largely covered by media.
- *In tourism sector*, the media mainly covered the participation of Moldovan tour operators and wineries at the ITB Berlin in Germany and Romania Tourism Fair, for promoting Moldova as a wine tourism destination.
- *In light industry*, the most reported event was the Moldovan Fashion Days, which attracted maximum media interest and was largely covered in online and TV media. The event had more than 40 appearances in mass media, presenting and commenting on this fashion event. The event reached 150,000 views while being translated online on privesc.eu.

The Appendix II include the list of selected publications and other communications products and media outlets for the period of January - March 2016.

SECTION III

HIGHLIGHTS OF ACTIVITIES PLANNED FOR FY16 Q3 (APRIL–JUNE 2016)

A. Wine and Tourism Industry

- Support new small winemakers including SEED Funding;
- Deploy tailor-designed assistance programs within the PQUP initiative;
- Design Wine of Moldova Academy;
- Proceed with SEC feasibility study;
- Implement next round of updates to electronic register software and improve adoption rate within the wineries;
- Define vendors of ERP solution adapted for wine sector;
- Finalize the software for random allocation of testers and organize seminars for tasters and certification authorities;
- Deploy ECP program for all three tiers of wineries, contract Polish import and distribution expert, draft and initiate discussions and implementation on support for export champions;
- Support adaptation of wine products to specifics of international markets;
- Finalize the research on the domestic market and present it to the sector within the Marketing Committee platform, as well as conduct public presentations;
- Develop and implement spring campaign directed at increasing sales and involving Wine Friendly restaurants;
- Organize meetings with sector stakeholders, define the international STTA needs, and involve all necessary parties in the development of the new sector strategy;
- Monitor the implementation and institutionalization of the ONVV institutional communication strategy and support ONVV to develop the new corporate website;
- Implement the business and marketing intelligence services plan, ensure the institutionalization of processes and takeover by ONVV;
- Contract international expert for development of WoM international PR & communication plan;
- Support in drafting and implementation of PGI Association development plan;
- Support the development of Wine Tourism Roadmap;
- Finalize the evaluation for the wineries;
- Support participation at IWINETC 2016, Wine tourism Conference;
- Support participation of tourism companies at IMEX Frankfurt MICE tourism exhibition and at Politician Forum during IMEX Frankfurt;
- Finalize the MICE Tourism roadmap development;
- Support participation at Tourism and Strategy event in Dubrovnik, Croatia
- Support organization of press tour for foreign media
- Support coaching program for inbound startups;
- Support the development of the 'Tourism Industry Legal Regulatory White paper';
- Support the expenditure of local festivals;
- Finalize the development of the general PR & communication strategy;
- Develop the concept of the National Wine Day;
- Support the development of internal wine tourism campaign;
- Support public-private partnerships for Orheiul Vechi development;
- Support organization of the Instameet event for Romanian bloggers;
- Support the organization of the first inbound forum to encourage travel agents to make inbound tourism;

- Support the organization of trainings for HoReCa (hotel, restaurants and cafes) and Guides;
- Support the moldova.travel platform upgrade and promotion;
- Finalize the development of the German and Polish tourist routes in Moldova;
- Develop the PR and Communication strategy for Tourism sector;
- Sign the Memorandum of Understanding with NTA on tourism development.

B. Light Industry

- Productivity enhancement program for medium and large companies that provides services for foreign clients;
- Start the implementation of Quality Management System and Occupational Health and Safety Management Systems at least in one company;
- Foster creativity and upgrade the local design skills of private brands.
- Start the development of the Road Map for the light Industry;
- Work with SEED grant team on implementation of grants in light industry companies, APIUS, and ZIPhouse;
- Continue building ZIPhouse capacity and content, defining the potential collaboration with foreign institutions;
- Digital marketing for ZIPhouse;
- Build ZIPhouse capacity and network, organizing events etc.;
- Finalize the Strategy of the Din Inima umbrella brand;
- Implementation of Din Inima Campaigns based on the PR Action Plan for 2016;
- Connect fashion companies to Agencies and Retailers;
- Pattern making for footwear producers.

C. Information and Communications Industry

- Finalize the ICT Skills Gap and present the results at Moldova ICT Summit;
- Keep providing mentorship to ATIC in implementing Tekwill project;
- Support ATIC to launch the iHub project with the support of SEED Forum Norway;
- Continue to work on the expansion of robotics clubs in educational institutions;
- Continue to support private initiatives aimed at developing the entrepreneurial ecosystem, develop the business and investment concept of the IT Park implemented by Starnet Company;
- Organize Moldova ICT Summit and Changers Challenge;
- Finalize and present to the stakeholders the ICT sector development roadmap;
- Continue to work on 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

- Support TUM in creation of new specialty within Industrial and Product Department that will be entirely based on Problem Based Learning approach;
- Finalize the Concept for Design Lab together with partners from TUM. Based on common understanding of role and functions of Design Lab and estimation of cost for its creation, plan to sign the MOU with involved stakeholders;

- Starting the feasibility study for National College of Vine and Wine from Stauceni;
- Finalize the revision of curricula for Fashion Design Specialty;
- Support the activities of signing collaboration agreements between TUM and Italian Universities that provide professional education for students and professionals from light industry;
- Finalizing the report on Skills Gap Analysis and distribute to the ministries, relevant state agencies, and industry representatives.

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

- Finalize the new IEE and present the final 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;
- Develop program statements and launch new Request for Applications (RFA) for grants in target industries with focus on ICT and wine sectors.
- Hold Selection Committee meetings under all issued RFAs and award grants in line with grantee capacity and risk assessment results.
- Continue implementing the Capacity Building Plans by hiring experts in various areas of need and by including special award conditions within the awarded grant agreements with four business associations – ANTRIM, APIUS, ATIC, and ASW.

D3 Development Credit Authority Activity

- Provide ongoing support to Prime Capital for the energy efficiency DCA agreement;
- Further support to USAID and financial institutions for implementing a new DCA activity in Moldova;
- Analyze the DCA implementation of two DCA agreements whose end date for Placing Qualifying Loans under Coverage have expired (March 31, 2016) and provide further assistance for other agreements in terms of implementation;
- Provide assistance and links between Mobiasbanca, the financial institution that is interested in being financially involved in the IT Park, using DCA guarantee and Starnet, the IT company to implement the IT Park concept;
- Define the loan guarantee mechanism to use for Starnet IT Park for raising additional financing.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

APPENDIX II

PROJECT MEDIA COVERAGE IN JANUARY – MARCH 2016

Title of media product	Media Outlet/link	Date/issue
LIGHT INDUSTRY		
Bijorhca Show January 22-25, 2016	https://www.facebook.com/USAIDMoldova/	27-Jan-16
Moldovan Hand-Made Accessories will be sold in US, Japan and EU markets	https://www.facebook.com/media/set/?set=a.1155732057771521.1073741837.317963934881675&type=3	
Moldova Fashion Days – evenimentul care scoate la lumină cele mai bune colecții vestimentare din Moldova	http://diez.md/2016/02/24/moldova-fashion-days-evenimentul-care-scoate-la-lumina-cele-mai-bune-colectii-vestimentare-din-moldova/	24-Feb-16
Moldova Fashion Days – 5 și 6 martie 2016	http://mybusiness.md/ro/component/k2/item/4333-moldova-fashion-days-5-si-6-martie-2016	4-Mar-16
Moldova Fashion Days, ziua I-a	https://www.privesc.eu/arhiva/65827/Moldova-Fashion-Days--ziua-I-a	5-Mar-16
(FOTO) Modele în ținute autohtone defilând în centrul capitalei	http://orasulmeu.md/foto-modele-in-tinute-autohtone-defiland-in-centrul-capitalei/	5-Mar-16
(Video) A doua zi de prezentări la Moldova Fashion Days	http://unimedia.info/stiri/video-a-doua-zi-de-prezentari-la-moldova-fashion-days-110783.html	6-Mar-16
Moldova Fashion Days, ziua II-a	https://www.privesc.eu/arhiva/65943/Moldova-Fashion-Days--ziua-II-a--main-stream-	6-Mar-16
11 creatori de modă autohtoni și-au prezentat colecțiile în cadrul celei de-a doua zi a ediției „Moldova Fashion Days”	http://www.prime.md/rom/news/other/item32525/	7-Mar-16
Fashion Days în Moldova	http://www.prime.md/rom/shows/item3/news/reportaje/item32518/	7-Mar-16
Moldova Fashion Days. Designerii autohtoni și-au prezentat colecțiile de primăvară-vară 2016	http://www.publika.md/moldova-fashion-days-designerii-autohtoni-si-au-prezentat-colectiile-de-primavara-vara-2016_2553461.html	7-Mar-16
Feminitate și strălucire la „Moldova Fashion Days”	http://www.canal2.md/news/feminitate-si-stralucire-la-moldova-fashion-days_40368.html	7-Mar-16
Moldova Fashion Days	http://unimedia.info/galerie/637#f4	7-Mar-16
(foto) Rochiile pastelate, preferatele designerilor de la Moldova Fashion Days (ziua II)	http://diez.md/2016/03/07/foto-rochiile-pastelate-preferatele-designerilor-de-la-moldova-fashion-days-ziua-ii/	7-Mar-16
Выбор Fashion Guide: Moldova Fashion Days / День 1	http://fashionguide.md/blog/fashion/vybor-fashion-guide-moldova-fashion-days-den-1-2.html	7-Mar-16
GIF / Moldova Fashion Days – evenimentul care a adunat fashioniștii din Chișinău	http://www.saksmagazine.com/gif-moldova-fashion-days-evenimentul-care-a-adunat-fashionistii-din-chisinau/	7-Mar-16
Moldova Fashion Days – evenimentul primăverii în industria modei autohtone. FOTO	http://madein.md/news/evenimente/moldova-fashion-days-evenimentul-primaverii-in-industria-modei-autohtone-foto	7-Mar-16
Moldova Fashion Days	http://heyevent.com/event/lauplo2jyuz4a/moldova-fashion-days	7-Mar-16
Самое яркое шоу этой весны - Moldova Fashion Days 2016	http://www.hardys.md/ru/news/samoe-jarkoe-shou-etoj-vesny-moldova-fashion-days-2016-1080	7-Mar-16
VIDEO. Moldova Fashion Days: Otilia Drăguțanu vorbește despre cea de-a 8-a ediție a show-ului de modă	http://agora.md/stiri/16905/video--moldova-fashion-days-otilia-dragutanu-vorbeste-despre-cea-de-a-8-a-editie-a-show-lui-de-moda	7-Mar-16
Moldova Fashion Days, cea mai tare petrecere de modă în această primăvară! (FOTO)	http://lookz.md/2016/03/08/fashion-days-la-chisinau/	7-Mar-16
Moldova Fashion Days	http://eventerbee.com/event/moldova-fashion-days,1686045355003530	7-Mar-16
LIVE: Moldova Fashion Days: Prezentarea colecțiilor primăvară-vară a 23 de designeri	http://www.timp.md/ro/news/livemoldovafa-hionday-prezentareacolecilorprimvar%20vara23dede-igneri/	7-Mar-16

Title of media product	Media Outlet/link	Date/issue
Moldova Fashion Days: ведущая Publika TV представила на подиуме оригинальное платье	http://news.kishinev.city/2016/03/07/moldova-fashion-days-vedushhaya-publika-tv-predstavila-na-podiume-originalnoe-plate/	7-Mar-16
Ha Moldova Fashion Days fabrica Ionel с успехом представила новую коллекцию «весна-лето - 2016»	http://www.kp.md/daily/26503/3372025/	8-Mar-16
(video) Julie Stufft despre Moldova Fashion Days: Colecțiile prezentate sunt gata să intre oricând pe piața SUA, pe orice piață de fashion	http://unimedia.info/stiri/video-julie-stufft-despre-moldova-fashion-days-colectiile-prezentate-sunt-gata-sa-intre-oricand-pe-piata-sua--pe-orice-piata-de-fashion-110942.html	9-Mar-16
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(video) "StarNet participa pentru al doilea an consecutiv la organizarea Concursului național de robotică"	http://protv.md/stiri/it/p-starnet-participa-pentru-al-doilea-an-consecutiv-la-organizarea---1365561.html	23-Feb-16
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Robotii moldoveni, ajunși la competiția First Lego League din Estonia, si-au făcut BINE treaba: s-au întors acasă victorioși	http://protv.md/stiri/social/robotii-moldoveni-ajunsi-la-competitia-first-lego-league-din-estonia---1387351.html	15-Mar-16
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Interviu la emisiunea Prima Oră	http://www.prima.md/rom/shows/item3/video/primaora/item5894/#main	18-Mar-16
Elevi din Chişinău au fost premiați la un concurs de robotică	http://vocea.md/elevi-din-chisinau-au-fost-premiati-la-un-concurs-de-robotica/	24-Mar-16
Câștigătorii trofeului FIRST LEGO League 2016 vin la „Bună Dimineața de Weekend”	http://www.trm.md/ro/moldova1/castigatorii-trofeului-first-lego-league-2016-vin-la-buna-dimineata-de-weekend/	25-Mar-16
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Rezultatele FIRST LEGO League Estonia Echipele RoboJunior și RoboRangers se întorc cu trofee pentru designul robotului și pentru lucru în echipă	http://edu.gov.md/sites/default/files/ffl_estonia2.pdf	
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Republica Moldova participantă la unul dintre cele mai mari târguri de turism din lume	http://travelnews.md/republica-moldova-participanta-la-unul-dintre-cele-mai-mari-targuri-de-turism-din-lume/	24-Jan-16
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Unde “evadăm” în 2016? Târgul de turism al României stabilește trendul	http://www.radiohit.ro/index.php/2016/02/26/audio-unde-evadam-in-2016-targul-de-turism-al-romaniei-stabileste-trendul/?platform=hootsuite	26-Feb-16
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Interviu cu Lilia Dulgher, femeia care are industria vinurilor implantată în ADN. "Păstrăm vie tradiția neamului nostru"	http://www.realitatea.md/interviu-cu-lilia-dulgher-femeia-care-are-industria-vinurilor-implantata-in-adn-pastram-vie-traditia-neamului-nostru_33962.html	4-Feb-16
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WINE OF MOLDOVA AT PROWEIN DÜSSELDORF 2016	http://locals.md/2016/wine-of-moldova-at-prowein-dusseldorf-2016/	11-Feb-16
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(video) Sunt wNe LOVE și sunt Wine Friendly	http://unimedia.info/stiri/video-Sunt-wNe-LOVE-i-sunt-Wine-Friendly-109613.html?utm_source=rss&utm_medium=rss&utm_campaign=rss	16-Feb-16
(video) Sunt wNe LOVE și sunt Wine Friendly	http://diez.md/2016/02/16/video-sunt-wine-love-si-sunt-wine-friendly/	16-Feb-16
VIDEO. „Campania WineFriendly”. Dara, proprietarul Tucano și fondatorul MinisTerrios vorbesc despre dragostea față de vin	http://agora.md/stiri/16367/video--campania-winefriendly--dara--proprietarul-tucano-si-fondatorul-ministerrios-vorbesc-despre-dragostea-fata-de-vin	16-Feb-16
(Video) Dara este îndrăgostită de muzică și vinuri: „Vinul aduce pace și ura în dragoste preface”	http://ea.md/dara-este-indragostita-de-muzica-si-vinuri-vinul-aduce-pace-si-ura-in-dragoste-preface-video/	16-Feb-16
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Pasiune și „wNe LOVE”, la a II-a ediție „Wine Friendly”	http://agora.md/stiri/16500/pasiune-si-wine-love--la-a-ii-a-editie-wine-friendly	17-Feb-16
O nouă rundă de degustații de vin	http://www.agrotvmoldova.md/o-noua-runda-de-degustatii-de-vin	17-Feb-16
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VIDEO: despre vin și dragoste	http://finewine.md/video-despre-vin-si-dragoste	19-Feb-16
VIDEO. WineFriendly: Directorul „Chateau Vartely”, Andrei Cibotaru și directorul „Grill do Brasii” despre spargerea stereotipurilor	http://agora.md/stiri/16545/video--winefriendly-directorul-chateau-vartely--andrei-cibotaru-si-directorul-grill-do-brasil-despre-spargerea-stereotipurilor	19-Feb-16
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(foto) Teoria de servire a unui vin moldovenesc la Wine Friendly Master Clas	http://diez.md/2016/03/09/teoria-de-servire-a-unui-vin-moldovenesc-la-wine-friendly-master-class/	9-Mar-16
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Vinul Moldovei revine la Dusseldorf în expoziția ProWein 2016	http://agrobiznes.md/vinul-moldovei-revine-la-dusseldorf-in-expozitia-prowein-2016.html	10-Mar-16
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Вино Молдовы возвращается в Дюссельдорф на выставку ProWein 2016	http://www.vinmoldova.md/index.php?mod=news&id=38325	11-Mar-16
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