



Macedonia Competitiveness Activity

Quarterly Report **April 2006 – June 2006**

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MACEDONIA COMPETITIVENESS ACTIVITY

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Executive Summary

NECC: The National Entrepreneurship & Competitiveness Council celebrated its three-year anniversary. The role of the Council was formally recognized by the government as a forum and means for dialogue between the public and the private sectors. Macedonia received higher credit rating from Fitch Credit of London and was described as a safer investment destination.

PED: By conducting a one-month PR road show around the country MCA's Public Education Department (PED) reinforced cluster messages and widely publicized the results achieved. Special printed materials on each cluster and the NECC, featuring the MCA final stage results, have supported the campaign. An event to celebrate the project's outstanding results crowned the forward-set MCA PR strategy. PED staff managed to maintain good communication with the media/public despite the governmental elections' black out period.

Lamb and Cheese: LTM (Lamb to Market) set up a functional sales structure to take advantage of opportunities to place Macedonian lamb in the Greek market year round. The LTM team plans to host a visit of the appointed sales agent and a potential client in order to demonstrate the capabilities of Macedonian lamb producers to satisfy the needs of Greek lamb buyers.

Tourism: Members of the Tourism Cluster and the Tikves Wine Road Foundation worked together to initiate the development of wine tourism in the Tikves Region. With assistance from MCA Tourism Consultant, Susan Snelson, the group built a solid base for future development of tourism in the Tikves region. The initiative has the potential to bring tourists to the whole country and contribute to the promotion of Macedonian wine.

IT: With MCA's assistance, Macedonian ISP's are working together to increase the awareness of government authorities/institutions about the importance of information security. Four Macedonian ISPs and MARNet, owner of the .mk domain, signed declarations and publicized action plans for implementing Internet security procedures in order to demonstrate commitment and progress in the area of Internet security policies. These efforts are part of an initiative to de-blacklist Macedonia from major international payment processing websites. MASIT members completed a market development trip in Israel and identified potential partnerships with Israeli IT companies.

Wine: In their increasing desire to become a notable wine player, Macedonian winemakers are working on establishing a professional wine tasting panel and

implementing a program for certification of high quality wines. Furthermore, Macedonian wines continue to get international validation for their quality at international wine competitions.

Apparel: A new production concept – Modular System – was introduced in Macedonia by apparel Production Expert Eugene Zenov. Preliminary analyses showed that the reorganized production line will increase productivity in the company where this system was installed by a minimum of 26% without any capital investments. The Textile Trade Association-Apparel Cluster elected a new management board and president and appointed an executive officer of the association.

Component A: Institutions: National Entrepreneurship & Competitiveness Council (NECC)

NECC Operations and Sustainability

The National Entrepreneurship and Competitiveness Council held its three-year anniversary on 17 May 2006. The meeting was divided into two parts. The first was a meeting of the Assembly of the NECC where the Presidents of the Assembly and the Management Board, Mirjana Apostolova and Minco Jordanov, each gave a short overview of the Council's history and progress and presented the Program (action plan) for 2006. The new members of the Management Board (the presidents of the Chamber of Commerce of Macedonia, Chamber of Commerce of North West Macedonia and the European Business Association) were officially inaugurated in this part of the meeting. Also, Bob Stapp, long time consultant to the NECC gave Assembly members his assessment of the sustainability and effectiveness of the Council's work, followed by recommendations for future development of the organization and membership (*please refer to Bob Stapp's full report*). These recommendations were considered by the Council members as they prioritized activities in the annual work plan.

The second part of the meeting featured presentations on the "Competitiveness of Macedonian products". Opened by Council member and Professor Vanco Uzunov, it included extracts from the newest WTO report on the export results presented by Professor Zoran Jolevski and presentations from competitive Macedonian companies (Pexim, Makstil and Global Plus). Professor Jolevski presented the newest export data and private sector recommendations collected on the Second Annual Export Conference. The companies' representatives talked about key aspects of successful export strategies, focusing on their personal experiences and practices. These presentations were followed by a detailed report on the creation and development of the Romanian technology and innovations park Tetarom made by the park's director, Viorel Gavrea, a guest speaker of the NECC. Gavrea's presence at the event was made possible with the support of MCA.

During this quarter, the NECC intensified cooperation with other donors, especially in the area of local economic development (LED). The Council identified a need for better coordination between all of the initiatives aimed at preparation of projects intended for EU assistance (pre-accession funds) that are being processed at the local and national levels. To address this, the NECC formed a new committee on Local Economic Development to be headed by the president of ZELS, Andrej Petrov. The committee membership will include representatives from the Ministry of Local Self Governance, ZELS and the City of Skopje, and one of its first tasks is to give input on the draft "Law for Regional Development".

Additionally, with the cooperation of GTZ's REDEM project, the NECC presented its platform and action plan at the Fourth Regional Assembly of the Mayors from the Bregalnicky Strumicky region in Eastern Macedonia. NECC proposes to make this type of presentation to all of the municipalities under the REDEM project. The aim of this is to inform a broader audience on the local government level about the Council's role, its

proposals and recommendations regarding building a more competitive Macedonian economy. Additionally, terms of cooperation with UNDP's Local Economic Development activity were defined, agreeing that the NECC will provide comments on all of the prepared drafts of the LED strategies.

The NECC successfully expanded cooperation with the Government and received its formal recognition to serve as a forum for dialogue and partnership between the public and private sectors. At its 103rd session, 1 June 2006, the Government of Macedonia adopted the information that was prepared by the Management board of the NECC (*please see Appendix A*). New forms of cooperation are proposed within the Program for 2006 (NECC's action plan) and include the involvement of public sector administrative staff in the work of selected committees.

The Council is continuously following news on Macedonia's ratings, and according to Fitch Ratings of London, Macedonia is becoming a safer investment destination based on its latest credit rating. "Continued prudent fiscal policy, moderate public and external debt levels and debt service ratios, as well as the country's status as an official EU candidate country since December 2005" were the main reasons for upgrading Macedonia's credit rating. Macedonia's foreign and local currency issuer default rating was upgraded from "BB" to "BB+" transitioning the "Outlook" to stable while the short term foreign currency rating is affirmed at "B". One more upgrade would move Macedonia in the "investment grade" range. The first credit rating for Macedonia (S&P 2004) came after NECC discussions on investments, when members from the private sector stressed the importance of obtaining a credit rating for the country.

In regards to sustainability, the Council was granted office space by the Chamber of Commerce of Macedonia. The Advisory Group staff has moved the office equipment that was donated by MCA but will continue to work out of MCA until telecommunications are installed in the new offices. MCA has also approved a \$30,000 grant to be used by the NECC for the production and promotion of the National Competitiveness Report and the organization of the Fourth Annual Conference on Competitiveness. Additionally, the NECC has prepared sponsorship offers that are to be distributed to selected private companies that have shown interest in sponsoring the Council's activities.

Component B: Consensus Building, Public Education and National Dialogue

Media Relations

MCA's Public Education Department (PED) continued promoting relationships with Macedonian and Albanian regional¹ radio and TV stations. This kind of cooperation will help the clusters maintain visibility among regional businesses, governmental and donor community circles long after the project closes down. Reports on results achieved to date were offered to the media to support the clusters in their first stage of sustainability. The well-established cooperation with the business portal *Total* continued to grow stronger. MCA/Clusters' results served as a resource for journalists to pursue full stories.

As a continuation of the journalists' education activity, PED organized a briefing on Digital Media (DM) Focus Group (IT Cluster) on 26 May 2006. The DM members gave presentations on their current and near future activities. The Macedonian Association for Digital Entertainment (MADE) and the Collaborative Media Group Ltd. (CMG) presented themselves as well. The Q&A session that followed helped the 6 journalists gain better knowledge of global DM industry trends and activities being made at local level to meet customer demands from foreign markets. Coverage in 7 printed media articles derived from the briefing. It also helped the industry members and the journalists establish closer relationships.

PR Road Show

To promote MCA/Clusters and NECC's successes, PED prepared and executed a wrap up PR Road Show. The plans were partially limited by the governmental pre-election black-out period, and all activities were accomplished in an intensive three-week period. MCA representatives gave interviews to 9 TV breaking news special editions, 7 TV economic growth programs (full program dedicated to MCA's activities) and 4 special radio programs. Media involved: *Macedonian Radio-Skopje*, *Radio Ravel-Skopje*, *TV Menada-Tetovo*, *TV Art-Tetovo*, *TV Kaltrina-Struga*, *Radio Ohrid-Ohrid*, *TV Miki-Ohrid*, *RTV Kocani-Kocani*, *TV Kavadarci-Kavadarci*, *TV Iris-Stip*, *TV Intel-Strumica*, *TV Vis-Strumica*, *TV Tera-Bitola* and *Radio Stip-Stip*. *Business* daily, *Fakti* daily and *Utrinski Vesnik* daily published a full page interviews with Suzi Kanyr Hagen, MCA's Chief of Party. The PR road show was a great opportunity to share cluster and NECC achievement and results with all target audiences at one time. The breaking timings of the broadcasts secured excellent viewership.

News Releases

To better communicate MCA results as well as respond to media inquiries, the PED team planned the following media coverage: news releases (3), media advisories (2), press conferences (1), articles and interviews were placed with regional and national television, print media and specialty business publications. *Total* – the business web portal - reported regularly on all MCA activities in the past quarter.

¹ Regional media include all media stationed and working around Macedonia. Local media are Skopje based media.

A news release on Internet security initiative was issued in late May. Among the web magazines that placed the press release on their websites were *Google Alert* and *Bios Magazine*, a UK based web magazine.

Interviews

PR support for two wine experts was arranged. Maggie McNie, Master of Wine, gave two interviews on the Macedonian wine export potential for *TV A1*'s agricultural program and *Kapital* business weekly. A press release also was issued. Wine consultant David Stevens had 4 interviews as follows: *TV Kavadarci*, *Kapital weekly*, *Spic daily* and *Vreme daily*. Stevens discussed the progress and future opportunities for the wineries. In addition, a media advisory was released.

Iva Orceva, wine cluster advisor, discussed placement of Macedonia's Wine Country Report placed in the 2006 edition of the Harpers Wine and Spirits Directory for UK and Ireland on *RTV Kavadarci*.

In support of the Digital Media industry development, an interview with MCA and CMG Ltd representative and overview of the idea for "film city" was published in the June/July /August edition of the unique digital entertainment magazine *Enter* (Macedonia).

PED placements for this quarter totaled 24 in print, 24 for television and 10 for radio as well as a substantial number of web placements, primarily in cooperation with the business portal *Total*.

Special Events Support

Training in Hospitality Management/Tourism Cluster Initiative – To acknowledge the active participation of the staff of 10 hotels in intensive hospitality training courses, certificate award ceremonies were organized. Hospitality training was given by culinary and hospitality expert, John Sinkeldam. A press release was issued upon completion of the second round of trainings² of Flamengo Hotel in Gevgelija and Arka, Imperijal and Mramor Hotels in Skopje. The 2 news wires, *Mak Fax and, MIA, and a couple of dailies picked up the press release*. In addition, the full feature interview was published in the business weekly *Kapital*.

Apparel Cluster Celebration – A well-planned celebration attracted more than 150 guests including cluster members, international/donor community representatives, Government representatives and NECC members. US Ambassador Gillian Milovanovic was one of the keynote speakers. Certificates were presented to 14 companies and designers who took the lead and shared a forward thinking vision of the apparel industry in Macedonia in the different stages of development of the cluster. The event was enriched with an Apparel Cluster Fashion Show, where products by distinguished

² Read more on the First round of trainings - Ohrid and Struga report in the MCA Quarterly Report January – March 2006

Macedonian apparel producers and designers of the Macedonian Fashion Formation were presented.

NECC Annual Assembly - PED helped the NECC support staff to prepare for the 3rd Annual Assembly meeting. Among other materials, a special four-page brochure was prepared and published before the event. To build on the knowledge and acceptance of the NECC among selected target groups and general public, PED arranged for the brochure to be distributed as a supplement in one edition of the *Kapital* business weekly. It directly reached out to the magazine's 2300 subscribers and over 1000 other buyers.

A press release and open media participation of the assembly was attended by 23 media. Three NECC members (Vlado Icokaev, Divna Jordanovska and Vanco Uzunov) gave exclusive statements to the media, resulting in excellent but not always accurate follow ups.

Prior to the event NECC representatives and support staff held an informational briefing with newspaper editors in order to reinforce the importance of continuous reporting on NECC achievements and actions.

Project Results Celebration Event - To celebrate the outstanding results achieved by the MCA through the five industry clusters and the NECC, PED organized a celebration for the cluster representatives, BS's as well as donor and international community representatives. More than 200 MCA counterparts attended the event. No governmental representatives were invited due to election black out period.

Deputy Chief of Mission Paul Wohlers and MCA Chief of Party Suzi Kanyr Hagen addressed the audience. A specially prepared documentary was debuted and presented the achievements and work of the individual clusters and NECC in 13 minutes. Messages of the documentary were reinforced in individual four-page brochures featuring each cluster and the Council (*please see [Appendix B](#)*). Copies of the promotional materials on MCA achievements and of the documentary were sent to USAID Headquarters in Washington D.C. by Dick Goldman, Mission Director of USAID in Macedonia.

Web Site

PED started with the final update of the cluster links on MCA's website. New success stories will be added in the website's section dedicated to the project's results.

Special Projects

Diaspora Cooperation

Macedonia Patriotic Organization Donation Project

MCA PED's Diaspora outreach continued working with the Institute for Respiratory Diseases in Children and the Macedonia Patriotic Organization (MPO). MPO's second donation an echo cardiac monitor totaling \$30,000 arrived in mid-June at the Institute.

MCA helped the donation be exempted from entry customs and tax costs. PR coverage is planned for early September 2006.

PED has been instrumental in helping the two organizations set their relationship on a firm basis and therefore stimulate more Diaspora and individual donations into the country.

Individual Donations

In early May under the leadership and personal efforts of the Atseff family, a group of immigrants donated an ion meter, device used for measuring the level of electrolytes in the blood, to the Institute for Respiratory Disease in Children – Skopje totaling \$4500. The device will help in advanced diagnosing and treatment of children-patients with heavy respiratory diseases. This donation was realized under the patronage of the Project – Mission for Macedonia of the Multinational Nativity of Our Lord Orthodox Church – Virginia, USA. Stephanie and Vladimir Atseff plan to broaden their humane mission in Macedonia.

A press release was issued and it was picked up by few local media including MIA news wire.

Component C: Demand Driven Selection of Clusters

Cluster Selection – Procedures and Criteria, Cluster Leadership Councils and Selection Process

MCA continued to support clusters in their efforts to achieve higher sustainability. In addition, the Apparel Cluster held its close-out ceremony to announce successful finalization of MCA's direct support to the cluster and cluster plans to continue sustainable operations. Apparel Cluster advisor prepared materials to be distributed as resources to help cluster members continue working on initiated activities post MCA.

Lamb and Cheese (LnC) Cluster

LTM (Lamb to Market) set up a functional sales structure to take advantage of opportunities to place Macedonian lamb to the Greek market year round. The LTM team plans to host a visit of the appointed sales agent and a potential client in order to demonstrate the capabilities of Macedonian lamb producers to satisfy the needs of Greek lamb buyers.

2006 Initiative Results

Initiative No.01/06 - Greek Test Market Program. To establish a functional sales organization and structure, the representatives of LTM appointed a sales agency in Athens (Angus Trading) to represent the interests of LTM in Greece. The assignment of this agency is to develop market outlets not only for the important pre-Easter sales period but also to generate sales for Light Lamb, Heavy Lamb, Sheep, Primal Cuts and Frozen Offal on a year-round basis. In addition, expectations are to expand sales into other segments of the food trade such as foodservice, including hotels, restaurants, caterers, cruise ships and ferry lines. The sales structure was set up to avoid the traditional layers in the marketing chain through appointment of a sales agent that will sell lamb on behalf of LTM to approved importers on a known and transparent margin.

LTM was forced to change its short-term strategy to sell to well-known Greek grocery chains due to the changed tactics of Greek government authorities responsible for hygiene, sanitation and origin verifications and the imposed rule to big grocery chains to sell only Greek Lamb. These measures lowered the prices of imported lamb in Greece and minimized the possibility for Macedonian producers to finalize the test shipment in the pre-Easter sales period. Thus, the LTM team started targeting neighborhood butchers as clients who are interested in offering quality imported lamb in addition to lamb of Greek origin and focusing on sales opportunities already developed for the after Easter period through the remainder of the year.

Continuing to work with their appointed agent on concluding a sale of approximately 400 lambs, the LTM team is organizing a visit for their agent and an identified client to meet

with representatives of the slaughterhouse and the managers of the Sheep breeders' Cooperatives. The visit is expected to be completed at the end of July 2006.

Non-Initiative Updates and Achievements:

- Italian buyers purchased as many as 140,000 lamb carcasses for Easter. The LTM team is planning to develop a similar sales structure for the Italian market as the one established in Greece and is also exploring other market areas.
- In the beginning of June, 2006, Predrag Cvetkovic completed a market development trip to Croatia acting on behalf of LTM and the Cheese Export Consortium. Cvetkovic met with representatives from two major retail chains, Getro and Tommy, as well as with economic development officers from Split County. The purpose of those meetings was to explore possibilities for future cooperation and establishing contacts for placing Macedonian lamb and cheese on the Croatian coast in order to take advantage of the high number of foreign tourists visiting.

Tourism Cluster

Members of the Tourism Cluster and the Tikves Wine Road Foundation worked together to initiate the development of wine tourism in the Tikves Region. With assistance from MCA Tourism consultant Susan Snelson, the group built a solid base for future development of tourism in the Tikves region. The initiative has the potential to bring tourists to the whole country and contribute to the promotion of Macedonian wine.

2006 Initiative Results

Initiative No. 01/06 – Hospitality training for hotel front desk and kitchen staff. IESC VE John Sinkeldam, catering and culinary expert and a member of the prestigious American Academy of Chefs, completed his assignment in Macedonia in mid April 2006 by delivering hospitality training to the personnel in four hotels in Ohrid (Flamingo, St. Naum, Donco and Metropol), Hotel Apollonia in Gevgelija and four hotels in Skopje (Arka, Imperial, Mramor and Stone Bridge). The managers of all of these hotels took active participation in identifying the areas in their operations where the most help was needed. Therefore, Sinkeldam focused on helping the dining room, kitchen and front desk personnel in improving productivity, professional conduct, efficiency and customer orientation. Sinkeldam developed individual manuals, menus, sanitation procedures, food costs and recipes for each hotel, based on the specific needs of the facility and the staff.

The personnel who attended the trainings and worked with the expert received certificates for successful completion of the training. News media attended a ceremony in Ohrid, and a news release was sent after the Skopje training was completed. The training in hospitality and culinary arts will be of great importance for applying the gained knowledge in the upcoming tourist season.

Initiative No.02/06 – Wine Tourism. Wine tourism is one of the fastest growing specialty tours in the world. It can be a driver of economic development and sustainability for smaller communities and regions. The Tikves Wine Region has the necessary components to develop tourism that can bring people to the whole country. In order to provide the set of guidelines to develop wine tourism in the Tikves region, MCA engaged Susan Snelson, tourism consultant, to assist the representatives of the Tikves Wine Road Foundation in the evaluation of the potential of the region and to provide clearly defined strategies and next steps in development of tourism experiences.

In the first phase of the assignment the consultant identified entities and individuals that have the leadership potential to take the initiative further and evaluated the capacity of the region to accommodate tourists and provide attractions for building a tourism destination. Much of the work was also accomplished by the members of the Tikves Wine Road Foundation that include the four Mayors of the municipalities in the Tikves Region (Negotino, Kavadarci, Demir Kapija and Rosoman), as well as representatives from travel agencies and wineries. This group was expanded with representatives of the arts and crafts associations and individuals who would like to provide B&B accommodations. (Due to the pre-election black-out, no municipal employees or mayors took part in the activities. However, the consultant met with each municipality to provide an overview of the activity.)

In the second phase a group of 20 selected participants went on a study tour in Bulgaria to draw on the experiences of several Bulgarian wineries and communities that provide B&B accommodation. Dimitar Maninov delivered a workshop for the group on the process of development of eco-tourism based on building a hiking trail that was voted among the ten best trails in the world by the international magazine Conte NESTE and brought substantial numbers of tourists to the community of Kalofer. Once the group returned from the visit of Bulgaria, a strategic planning session was held with Susan Snelson to identify short-term projects to proceed with the strengthening of the Foundation and developing the Tikves wine region into an attractive destination for tourists (*please refer to detailed report done by Susan Snelson*). In the short term the group will develop a data base of information about the region and set up B&B accommodation. These represent essential activities to bring tourists in the region.

Non-Initiative Updates and Achievements

- The Hotel Association of Macedonia (HOTAM) in cooperation with the City of Ohrid and a Croatian public relations agency organized a FAM tour for 20 Croatian journalists. HOTAM once again demonstrated the leadership potential to continue with the activities undertaken by the Tourism Cluster, as well as its commitment to promote Macedonian tourism. Apart from Ohrid, the journalists visited Skopje and Mavrovo.
- Ancient Macedonia and Alexander the Great tours are increasing popular among UK and USA tourists. Explore!, giant UK-based tour operator, is bringing seven tours to Macedonia with 25 persons each. Kompas Skopje and Explore! are

- already set for the 2007 Ancient Macedonia tours. Representatives of Kompas and Explore! met at the first FAM tour hosted by MCA and the Tourism Cluster. Furthermore, about 50 US tourists came to Macedonia with Vantage Deluxe World, a Boston based tour operator. Over 50% of the Alexander the Great tours offered for 2006 by Vantage Deluxe World are already sold out.
- A one-page story on Macedonia was published in the May edition of the UK high circulation *Motoring & Leisure Magazine* ([please see Appendix C](#)). The author of the article was among the travel writers who visited Macedonia in the FAM tour hosted by MCA and the Tourism Cluster in the summer of 2005.
 - Macedonia received extensive positive coverage as a result of the familiarization tour organized by the Dutch Chamber of Commerce. The FAM trip was planned to coincide with the unveiling of A. den Dolard Memorial in Ohrid. Follow up publicity appeared in *Volksrant*, the second largest newspaper in Holland, *Telegraaf*, *NRC* weekly magazine, *RNW* international radio in five languages on shortwave and satellite, *BVN* Dutch and Belgian satellite television, *Parool* and *Trouw* newspapers, *NOS* radio and television and *NPS* radio. The number of Dutch tourists visiting Macedonia increased 400+ percent, from under 5,000 in 2002 to about 20,000 in 2005. Two of the Dutch tour operators that were part of the FAM tour announced to start bringing tourists as early as July 2006, while the other two will start in 2007.

Information Technology (IT) Cluster

With MCA's assistance Macedonian ISP's are working together to increase the awareness of government authorities/institutions about the importance of information security. Four Macedonian ISPs and MARNet, owner of the .mk domain, signed declarations and publicized action plans for implementing Internet security procedures in order to demonstrate commitment and progress in the area of Internet security policies. These efforts are part of the initiative to de-blacklist Macedonia from major international payment processing websites. MASIT members completed a market development trip in Israel and identified potential partnerships with Israeli IT companies.

2006 Initiative Results

Initiative No. 01/06 – Fuji Film FDI in MADE Digital Media Film City. The milestones from this initiative have been met. The initiative is completed and reported on in January-March 2006 Report.

Initiative No. 02/06 - Macedonia Information Technology Industry Research Initiative. The IDC Report was finalized and presented on MASIT Open Days Conference (May 11-12, 2006). The initiative is completed (*please refer to full IDC Report*).

Initiative No.03/06 – Market development trip to Israel. In the series of meetings between Israeli Ambassador Ben Abba and MASIT leaders, Israel was identified as

potentially lucrative market for outsourcing and near sourcing work for Macedonian IT companies. Therefore, five MASIT members traveled to Israel (4-9 June 2006). During the five-day visit, the representatives of the Macedonian delegation met with IT companies, IT associations and representatives from IT R&D Centers and IT Industry Development Centers, and also attended the Information Security Exhibition in Tel Aviv (*please refer to detailed report done by Toni Petreseki, MASIT president*).

Apart from increasing the knowledge of how Israeli government supports the development of the IT industry and forging connections with key associations, the members of the delegation identified potential cooperation with Israeli companies including:

- Partnership to implement Event Management software solution for 21 Convention centers in Macedonia and the Balkan region;
- Partnership in distribution and market research with financial risk share for the Medical Centers and Clinics software and for Optician's Shops;
- Partnership with the Macedonian medical software systems integrators for the World Bank Macedonian Health Insurance Fund tenders;
- Exclusive Distribution Agreement and EU Projects cooperation with the English teaching institutions, Ministry of Education, Corporate and Retail English Courses (1.000 hours English courses offered);
- Partnership for English Education & Courses (850 hours English courses offered);
- Partnership for the telecommunication systems integration projects for the army, government and infrastructure oriented companies.

Follow up calls have already been received by several cluster members, and Aladdin, the largest Internet security hardware and software company in Israel, has tentatively scheduled a visit to Macedonia in July 2006.

Initiative No. 04/06 – Marketing support to MADE and CMG. In June 2006, visual effects expert Steve Wright, and marketing expert Rita Cahill worked with Collaborative Media Group Ltd to help finalize preparation of a marketing strategy and sales tools of the company.

Steve Wright delivered hands-on training by implementing high-level compositing techniques including matte painting, film compositing, higher level blue screen techniques, computer graphics images and adaptation for film visual effects. The training was administered at AXIS Training Center and represented the second part of the Visual Effects for Film Workshop in order to finalize the Demo Reel for Visual Effects. The Demo Reel is the most important sales tool that demonstrates the capabilities, capacity and quality of the work that CMG can deliver to the specific market. The Demo Reel will be used to present the company to potential clients during the SIGGRAPH Fair, organized in Boston, USA, 1-3 August 2006. Part of Wright's assistance to CMG was to prepare a comprehensive list of the equipment and staff needed for the CMG VFX studio.

Simultaneously to developing the Demo Reel, CMG worked with Rita Cahill to finalize the marketing plan and business development strategies targeted at specific niche markets

in the US, in line with the products that can be delivered by CMG. Cahill has already introduced CMG to prospects in LA. She has expressed interest in representing CMG longer term and will continue to provide the marketing and sales support during SIGGRAPH 2006.

By the end of Wright and Cahill's visit, several important deliverables were produced:

- CMG Demo Reel (war scene; Bitola to be completed)
- Final marketing plan
- Inventory for equipment and staff needed for CMG VFX studio

“Building a Culture of Internet Security” Initiative

In October 2005, Macedonia Competitiveness Activity started a Cyber Crime Mitigation Project by contracting Ryan Calemer, Regional Technical Manager with VeriSign, to assess the security procedures undertaken by Macedonian ISPs and deliver workshops on fighting cyber crime, as well as on prevention and policing of cyber crime. The findings of the report were presented at the conference organized on 18 April 2006 as a follow up of the previous efforts to get Macedonia de-blacklisted from major electronic payment processors. The Conference was attended by 30 representatives from Macedonian ISPs, commercial banks and government institutions. The event was organized in cooperation with Trajkovski & Partners Consulting, whose involvement was on voluntary basis and included active participation in structuring the project and initial meetings with the Macedonian ISPs and Marnet, the owner of the .mk domain.

The VeriSign report found the rate of Internet fraud in Macedonia to be relatively low. The decision by some payment processors to blacklist the domain had more to do with the fact that:

- Macedonia was in a “bad neighborhood” for Internet fraud (Serbia, Romania and Bulgaria do in fact have high rates of fraud)
- ISPs had done an insufficient job in publicizing their security policies,

than with actual incidences of fraud (*please refer to detailed report done by Ryan Calemer*).

As a result of the Conference MARNet, UNET, Makedonski Telekomunikacii, On.net and NeoTel signed Declarations on Information Safety and completed the Information Security Action Plan for establishing Minimal Security Controls, recognized by ISO 177799 standard. This is the first step for promoting the commitment of the country to combat cyber crime and get Macedonia off the “Internet black list.”

To support these actions, MCA contracted Trajkovski & Partners Consulting to do an audit of the security procedures at MARNet and provide assistance in outlining the action plan for implementation of security procedures. MCA also assisted in the international PR campaign of the initiative by sending a Press Release to major international web based magazines (*please see Appendix D*). The press release was published on Google Alert on 26 May 2006.

With MCA's assistance Macedonian ISP's are working together to increase the awareness of government authorities and institutions about the importance of information security and assure their support for the initiative. They are in the process of publishing their Internet security procedures and action plans on their websites, as well as on the website of the Macedonian Agency for Electronic Communications.

VeriSign committed to provide help in enabling Macedonian (.mk) domain-based computer users to conduct online financial transactions by contacting eBay, PayPal and Skype once all the documentation on Internet security procedures has been publicized by Macedonian ISPs.

Non-Initiative Updates and Achievements:

- CMG Ltd. finished the development of the business plan and corporate structure. CMG elected a seven-member Executive Board and held several sessions with Bob Stapp to define roles and responsibilities, as well as communication within the established corporate structure. The Board held interviews with candidates for the position of Chief Executive Officer and is expecting to have the position filled by mid July, 2006.

Wine Cluster

In their increasing desire to become a notable wine player, Macedonian winemakers are working on establishing a professional wine tasting panel and implementing a program for certification of high quality wines. Furthermore, Macedonian wines continue to get international validation for the quality at international wine competitions.

2006 Initiative results:

Initiative No.2/06 – UK export market follow up. As follow up of the event organized in the UK and part of the implementation of the export marketing strategy, in early April 2006 the Wine Cluster worked with Maggie McNie, Master of Wine and lecturer for the Wine and Spirits Education Trust and Wine Consultant. During her one-week stay, McNie visited nine Macedonian wineries (Popova Kula, Tikves, Cekorovi, Pivka, Bovin, Skovin, Fonko, Popov and Dudin) to become acquainted with the wines produced in Macedonia and be able to identify qualified leads for the wineries/groups of wineries. Towards the end of the visit, McNie held two wrap up sessions for the wineries in order to present her findings as well as recommend an approach for pursuing the UK market through identified distributors for different wineries/groups of wineries.

As a result of the work with Macedonian wineries, McNie also provided assistance to Tikves Winery prior to and during the London Wine and Spirits Fair, held 18-21 May 2006. McNie was able to arrange visits of UK wine writers and buyers to the Tikves stand. Tikves was the only Macedonian winery that exhibited at the fair and received high frequency of visitors and huge interest in the wines, especially the local varieties

grown in Macedonia and relatively unknown to the UK buyers and media representatives. As part of the promotional activities during the fair, Tikves published a full page advertisement in the specialized wine magazine *EuroWine* ([see Appendix E](#)). The magazine is distributed at wine trade fairs and directly to wine professionals throughout the world (circulation of 15,000 copies).

Initiative No.3/06 – Technical Assistance to Wineries. During the month of May 2006 Wine Expert, David Stevens continued his previously commenced work with wineries to improve the quality of the wines produced. Major finding from his latest trip and work with the wineries is the identified mindset change of winemakers and winery management regarding quality and style of production.

“The Macedonian wine industry has matured (in terms of attitude and product development) at a rate far faster than anyone could have hoped. With MCA’s involvement in the wine sector, beginning in the fall of 2003, the industry has matured from ten to fifteen years.” (Please refer to detailed report done by David Stevens)

Another key activity was to provide assistance to the wineries to establish a wine tasting panel. Therefore, Stevens gave two workshops. The first workshop, held at MCA’s offices in Skopje, involved the development of the general format of the organization and the way in which wines were to be evaluated. Winery principals were invited to share their views on how such a tasting based system would be implemented. In order to address the fact that the skilled wine professionals have little or no experience evaluating quality of wines in a more formal setting, a second more practical session was held at the Hotel Park in Negotino. The purpose of this workshop was to show the participants the setup and operation of a formal wine evaluation based on the consultant’s experience as an international wine judge. In addition to the demonstration, intentionally flawed wines were presented to the participants along with illustrative examples of high quality international wines.

The goal of the establishment of the tasting panel, as well as implementation of a program that will evaluate the quality of the wines and mark them with a specifically designed sticker is to offer all of Macedonia’s wineries an open and transparent way of getting the message to consumers that the products they are offering are of consistent high quality. Although this program is principally designed as a sales tool, the development of a group of skilled wine judges represents another step in the growth of the wine professionals of Macedonia into more skilled enologists. This is an important milestone for Macedonia in the process of becoming a notable player on the world wine stage.

Non-initiative updates and achievements

- After the registration, the members of the board of MAKVINO (Association of Producers of Quality Wines from Macedonia) attended a two-day workshop on association development delivered by Rudolf Nickenig, president of the German National Wine Producer’s Association. SIPPO (Swiss Import Promotion

- Program) organized this workshop on MAKVINO's request. In addition, Divna Jordanovska, president of MAKVINO, had several sessions with Bob Stapp, MCA organization development consultant, on issues of internal communication within MAKVINO, increasing the membership and communication of the vision and goals of the association to other industry members.
- For the first time ever, the 77th volume of *Harper's Wine and Spirits Directory* includes information about Macedonia as a wine producing country. A full page report on Macedonia was included in the 2006 Country Reports section of this annual publication that represents a major resource of information to the UK and Ireland wine market, as well as wine professionals throughout the world.
 - Pivka, Popov and Cekorovi hosted a one-day tasting at Skopje Fair on 7 April 2006. The goal of the tasting was to promote their wines to the general public but also educate consumers on the production of high quality wines. The President of the Association of Sommeliers of Serbia was invited to talk to the media and visitors on serving, cellaring and proper handling of wine. Initial contacts with this association were established at the 2004 Wine Challenge Competition, an event that kicked off the activities of the Wine Cluster with MCA's support.
 - 2003 Merlot from Pivka and 2003 Merlot from Popov won bronze medals at the 2006 Challenge International du Vin. This international competition is the oldest in France and is organized every year in Bordeaux. In 2006, 5072 wines from 26 countries entered the competition, and 25% of the tasted wines were awarded. Furthermore, 2003 Fonko Buchephal (Vranec) received a Seal of Approval at the 2006 International Wine Challenge. 9000 wines were tasted at this annual international competition organized in London.
 - Slovenian wine writer Stasa Cofuta visited eight wineries in the Tikves wine region as part of her one-week trip to Macedonia. The article on Macedonian wine is commissioned by the Slovenian specialized wine magazine *Vino*. The magazine is targeting wine consumers and has national distribution in Slovenia. Macedonian wines are exported in Slovenia and this article will contribute to greater promotion of their quality, as well as the winemaking advantages of the region.

Apparel Cluster

A new production concept – Modular System – was introduced in Macedonia by apparel production expert Eugene Zenov. Preliminary analyses show that the reorganized production line will increase productivity in the company where this system was installed by a minimum of 26% without any capital investments. The Textile Trade Association-Apparel Cluster elected a new management board and president and appointed an executive officer of the association.

2006 Initiative Results

Initiative No. 01/06 - Apparel human resources development. Part of the initiative was cancelled and reasons reported on in January-March 2006 Report.

Four of the five future instructors at Academia Italiana Skopje have completed the training provided by Academia Italiana Florence. The training was sponsored by USAID's HICD project. The four candidates are expected to start teaching as part of the personnel at Academia Italiana Skopje in the beginning of the 2006 winter semester.

Initiative No. 02/06 - Productivity improvements in semi-heavy confection. Apparel production consultant Eugene Zenov introduced a new production concept to improve productivity of Macedonian apparel companies that produce semi-heavy confection. In addition to the presentation of the Progressive Bundle System in production of shirts, the Modular System for production of blazers was presented to Macedonian apparel companies. The project was implemented by selecting a company (Milano, Stip) where a prototype production line was installed. Milano was experiencing problems in meeting increased customers' demand for blazers. The preliminary calculations show that the productivity level has increased 26% (*please refer to detailed report done by Eugene Zenov*).

The knowledge of installing Modular Systems in apparel production was transferred to Professor Goran Dembovski (Faculty for Technology) who accompanied Zenov in all phases of implementation of the project. After the screening of productivity results is completed, Professor Dembovski will deliver a workshop for engineers and managers from other Macedonian apparel companies. The workshop will be organized at Milano and is tentatively scheduled for mid August 2006.

Non-Initiative Updates and Achievements

Cluster sustainability

More than 40 registered members of TTA-AC attended the first General Assembly of the organization and adopted the new bylaws and charter. New Managing Board and president (Vlado Netkov) of the association were elected at the meeting.

The new managing board and the president of TTA-AC selected Natasha Sivevska as executive director of TTA-AC. The executive office of the association was established in June 2006 at the premises of the Macedonian Chamber of Commerce.

MCA Apparel Cluster advisor used the opportunity to disseminate CDs with all the relevant information, cluster files (work plans, organizational development documents, reports, market research manuals, business plan development manuals, PR and marketing guide and BSP and donors lists) necessary for operation of TTA-AC's executive office.

Among the first activities organized by the TTA-AC was hosting a regional meeting to demonstrate the importance of including Turkey among the countries members of the EU Diagonal Cumulation Agreement. Representatives from Greece, Serbia, Croatia and Turkey, as well as large number of media were present at the meeting. The meeting was organized with support of the NECC, Customs office, CRPM, and Macedonian Chamber of Commerce and is part of the ongoing lobbying done by the TTA-AC members.

Marketing and Promotion

Cluster companies continue to report new contracts from leads generated at trade fairs they attended with MCA assistance:

- Kimico reported more than 350,000 euros of realized contracts for Spanish customers and is negotiating with Scandinavian and Italian customers after shipping two test orders of various cotton knit-wear items.
- Tetex reported a 30,000 euro realized contract with an Italian customer based on a contact made at the Milan fair in 2005.
- Kuli reported that negotiations with an Italian customer began after delivering its third test order. The company expects to conclude the final one in September 2006.
- Deltatex signed a 40,000 euro contract with a new customer from Austria for female and male shirts.

Regional cooperation

In April 2006, SEDP (Serbia Enterprise Development Project) and MCA Apparel Cluster advisors together with the president and deputy president of the Serbian Union of Apparel Manufacturers visited NEW TREND Textile Technology center in Stip. The objective of the visit was to share experience from the work of the Center with the Serbian counterparts and establish cooperation with the members of the Serbian delegation who also met with Vlado Netkov, president of TTA-AC.

Component D: Cluster Support and Sub-Projects

Grants Program

Most of the grantees finalized the activities planned under the approved grants and submitted documentation for reimbursement of funds. Slobodanka Velickova, grants administrator, assisted cluster members in final reporting of the implemented activities.

Updated on Previously Awarded Grants:

1. **MASIT (Macedonian Association of Information Technology)** completed the grant activities by organizing the 2005 Annual Awards Ceremony and announcing the awards for the best three IT achievements³. Representatives from each of the companies that received MASIT's award were present at the World Congress for Information Technology 2006 (WCIT2006), Austin, Texas as part of the official MASIT delegation at the conference organized in May 2-5, 2006. On Net, winner in the category of Digital Opportunities for their Macedonia - First Wireless Broadband Nation achievement was among the six (6) winners of the WITSA 2006 Global IT Excellence Awards. The complete list of winners is published at <http://www.witsa.org/awards06/WITSA-Awards06Winners.doc>⁴. Senior Executive representatives from *Nextsense*, Vasko Kronevski, *OnNet*, Predrag Cemerigic, and the Minister of Education and Science, Mr. Azis Polozani, attended the Press Conference, held on 4 May, 2006 at the Press Conference Room in Austin Convention Center. Each awarded winner was given time to present their winning projects during the press conference.
2. **Axis Softimage Authorized Training Center** promoted the training center and the courses offered at the "Days of Education and Career 2006" organized by SEA at Skopje Fair, 6-8 April, 2006. Axis used the fair to recruit talented candidates for the courses by providing an opportunity for interested visitors, mostly high school students, to express their drawing capability. Over 150 students participated in the Character Design Contest and 33 of the contestants were awarded partial scholarships for the Softimage XSI training. MCA assisted the establishment of the training center through the Small Grants program.
3. **Liva Komerc**, the private operator of the facilities at the **Stobi Visitors Center**, continued their promotional activities during this quarter. Large permanent Mega Board was placed in the vicinity of Stobi locality. The Mega Board is visible from both sides of the highway. Furthermore, Liva Komerc organized a promotional event at Stobi to honor May 9th, Europe Day. A classical music concert took place at Stobi amphitheatre. Over 200 people from Negotino, Kavadarci and Veles were present. The purpose

³ Reported in QR October – December 2005

⁴ Reported in QR January – March 2006

of the event was to promote the Visitors Center and its capacities as an ideal place for spending leisure time, but also as a place for business meetings, seminars and workshops (*please see [Appendix F](#) for photos of the MEGA Board and the promotional event*).

4. **MADE (Macedonian Association for Digital Entertainment)** completed the first phase of their activities in creating a website that will provide information to the TV, film, advertising and photographic industries about the possibilities and benefits of shooting in Macedonia. The process entailed mapping locations with their characteristics and filming attributes, photographing and categorizing the locations into one data base. The next step is to upload the materials on the website to allow easy access to all information required for production planning. By doing this, MADE hopes to attract international producers and help fuel the development of the Macedonian digital entertainment industry. The design of the web and some of the locations can be seen at <http://www.makedonika.com.mk/test/?site=webFilm/index.html>
5. **Global Plus**, an apparel agent, was awarded a grant to promote the first Macedonian textile Logistic centre in the EU market. The promotional activities included printing direct mail letters and leaflets, designing a web page www.global-plus.com.mk and placing an advertisement in the May 22, 2006 edition of the specialized textile magazine "Journal du Textile". The weekly magazine is printed in 20,000 copies and distributed throughout France (www.journaldutextile.com). The direct mail letters and flyers were printed into Italian and Spanish and mailed directly to their potential customers in Italy and Spain. Many of those contacts were established during their participation on the fairs in Milan and Spain (*Please refer to the [Appendix G](#) for direct mail letters and leaflets in Italian and Spanish*).
6. **VIT, Linea and Milano** joined together to form an export consortium to penetrate the German market and invested into a joint collection "Porta Bene". MCA assisted the companies to produce promotional materials as part of the professional presentation to their prospective clients. The consortium concluded the first sales of the collection. The received two orders from German clients (185,000US\$) are the beginning of continued sales. As a direct result of displaying the collection at a Fashion Show in Toronto, Canada, in September 2005 the consortium concluded a contract valued at US\$22,500. The documentation for reimbursement of funds approved with the grant needs to be submitted by the consortium.
7. **Gord Systems** completed two marketing trips as part of their grant activities:
 - Road show in Switzerland organized by SIPPO (Swiss Import Promotion Program) and SIMSA (Swiss Association for Internet, New Media and Software) to present their software solutions in Healthcare as well as myWebPortal / myHealthPortal products

- Participation in the SEEFICT Congress, Belgrade, Serbia organized by JISA (Union of ICT Societies).

Gord Systems presented the myWebPortal product in the Conference Presentation Program and had a booth in the exhibiting hall. The title of the presentation was “Developing eBusiness solutions based on myWebPortal platform”. As a result of the exhibition Gord Systems already sold myWebPortal Enterprise Edition to the Agency for IT and Internet of Republic of Serbia (approximately 10,000 Euros) and has potential order for additional 20-30 licenses of myWebPortal Professional (approximately 20-30,000 euros).

8. **Story Board**, a digital media company, was awarded a grant to extend scholarships to seven most talented 3D computer artists from the digital media industry as part of the ongoing efforts to increase the number of skilled computer artists in Macedonia. The seven candidates attended the Avid Softimage|XSI v.5.0 course taught at Axis Softimage Training Center. All candidates successfully completed the training and submitted a final project at the end of May, 2006. The seven artists: Ana Panovska, Danilco Stefanovski, Marjan Milenkov, Gorgi Janevski, Nikola Nikolovski, Aleksandar Ristovski and Vangel Karaivanov received a Certificate of Completion of Avid Softimage XSI course.
9. **Hotel Arka** finished the activities of placement of road signs and printing hotel brochures/flyers⁵. During this quarter Arka was supposed to accomplish their final activity of placing Billboards to advertise the services offered and the location of the hotel. Due to financial restrains Arka was not in a position to accomplish this activity.
10. **Bergamo** completed the planned promotional package by producing brochures, a company CD and designing a new web page www.bergamo.com.mk. The company printed two brochures (Contract Manufacturing brochure and Label brochure), which will be used for their planed visits on the fashion fairs in Milan, Madrid and Paris (*Please refer to the [Appendix H](#) for brochures*).
11. **Radio Ravel** was awarded a grant for developing a series of radio shows to cover a variety of tourism issues in Macedonia and educate the public about the importance of sustainable tourism. The first radio show from the series named "Guide to the Unknown" was aired on June 1st, 2006. It contained general information about Macedonia as well as two short stories on paragliding and the smallest ethno museum in the world (as recorded at the Guinness Book of Records) located in Dzepchishte, Tetovo. The show will be broadcasted each Wednesday from 9:00 am to 9:30 am over a period of one year.
12. **Inter-Kont**, travel agency, developed their web page www.interkont.com.mk, which includes a number of alternative tourism and cultural tours. The web page is made in Macedonian, Albanian, English and Russian and will help Inter-Kont become more visible on the international market in promoting alternative and

⁵ Reported in QR October – December 2005 and QR January – March 2006

- cultural tourism in Macedonia. Due to the fact that the website was recently launched it is still difficult to measure the business results.
13. **Serta**, slaughterhouse located in Kavadarci, installed the additional equipment needed to satisfy the requirements for implementing HACCP⁶. The management of the company reported that out of the total 130,000 lamb carcasses exported from Macedonia in the pre Easter season, Serta alone accounted for 53,000. The exported lamb went to Italy, Croatia and Greece. A test shipment was also sent to Bosnia. MCA helped the slaughterhouse with a grant for equipment that increased their productivity for over 30% and improved the capability of the company to export lamb in EU markets.
 14. **Popov Winery** completed the grant activity by launching the newly designed website www.popovwinery.com.mk. The website contains information on the winery's recent success and received awards, description of the wines produced, the winemaking technology used and information about the winery and the region. The bilingual (English and Macedonian) webpage is part of their export marketing plan and will contribute to web promotion of Popov Winery.
 15. **Buchen Kozjak** completed the installment of the equipment obtained with the approved grant (new dozer, sealing machine and bulk packing machine). The new equipment will improve the dairy's efficiency, quality of production, as well as extend the shelf life and improve branding of the products. The equipment was obtained in order to satisfy the requirements for exporting cheese in the US market. The management of Bucen Kozjak plans to expand their existing market and penetrate new foreign markets with the increased productivity and quality of production. In the short term, the dairy will secure an export license number and start exporting in Kosovo.
 16. **Hotel Mramor** finalized their grant activities with printing new brochures and flyers. This small family hotel provides services mostly to businesspeople visiting Skopje and will be sending direct mails to Embassies and NGOs in an effort to promote the hotel's services to foreign business visitors. In addition, Mramor placed large road signs on the four entrances into the city (*Please refer to the [Appendix I](#) for brochures and flyers as well as photos from the road signs*).

⁶ Reported in QR January – March 2006

Component E: Coordination and Synergy (with USAID and Other Donor Activities)

Specific examples of USAID MCA's cooperation with USAID and other donor activities are provided where appropriate throughout this report.

USAID Projects	Other Donors/Donor Activities	Other Entities
I-LEAD/E-Biz	UNDP – UN Development Program	Tikves Wine Road Foundation
Macedonia Connects	S-FARM 2 (Swedish government supported development program)	MAKVINO – Association of producers of quality wine from Macedonia
LOL/Agland	SIPPO – Swiss import promotion agency	TTA-Apparel Cluster
HIDC/World Learning	IFAD – International Fund for Agricultural Development	Dutch Chamber of Commerce
US Embassy Commercial Officer	CBI – Dutch import promotion agency	European Business Association
SEDP (Serbia Enterprise Development Project)	UNDP – UN Development Program	Chamber of Commerce of RM
	GTZ – German Technical Assistance	ATAM – MK travel agency association
		HOTAM – MK hotel association
		Chamber of Commerce of Western Macedonia
		MASIT – Macedonian IT Association
		MADE – Macedonian Association for Digital Entertainment
		Western Sheep Breeders Association
		Eastern Sheep Breeders Association
		ISPs (MakTel, Onnet, Unet, Neotel) and MARNet
		Macedonia Patriotic Organization

Component F: Gender

Table 1. Gender disaggregated data on project activities (Jan-Jun 2006)

Indicator	Tourism Cluster		L&C Cluster		IT Cluster		Wine Cluster		Apparel Cluster		NECC		Grants		PED		
	#W	#M	#W	#M	#W	#M	#W	#M	#W	#M	#W	#M	#W	#M	#W	#M	
CLC members / NECC MB members	5	6	4	8	5	16	3	4	2	10	2	12	N/A	N/A	N/A	N/A	
Cluster / NECC members	31	55	9	30	12	45	10	40	45	55	4	22	N/A	N/A	N/A	N/A	
Participants at cluster / NECC meetings	18	20	30	80	12	45	14	35	17	20	12	49	N/A	N/A	N/A	N/A	
Participants at trainings	40	30	0	10	2	7	10	30	30	50	N/A	N/A	N/A	N/A	N/A	N/A	
Participants at events	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	241	286
Participants at events designed for journalists	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	24	14

Source: MCA attendance records and lists of officially selected representatives for decision making bodies

Component O: Project Management

In accordance with the previously approved staff reduction plan, several MCA employees completed their contract with MCA:

Name	Position	Engagement ending date
Agim Salja	Lamb and Cheese Cluster Advisor	15 April 2006
Dejan Antic	Apparel Cluster Advisor	30 June 2006
Slobodanka Velickova	Grants/Office Manager	30 June 2006
Ljubica Arsovska	Translator	30 June 2006
Frederika Jakovska	Translator	30 June 2006
Katerina Tasevska	Cluster Assistant	30 June 2006

The final inventory disposition list of MCA equipment and furniture was approved by USAID. MCA staff started arranging distribution of available furniture and equipment to organizations and associations based on the allocations in the inventory disposition list.

MCA requested to withdraw previously submitted documentation for a contract modification to close the project at the end of June 2006 that remained pending. MCA presented an addendum to the 2006 Work Plan with initiatives, staffing plans and budget projections until the project closes at the end of September 2006. The new request and three-month plans were being considered by USAID as the quarter closed.

MCA Chief of Party Suzi Kanyr Hagen completed her long-term assignment with MCA in mid-July at which time Iva Orceva, deputy chief of party, took over as acting chief of party until the project's close on 30 September.

This will be MCA's final quarterly report.

APPENDIX A



The National Entrepreneurship and Competitiveness Council was formed in June 2003 as a joint project of the Government of the Republic of Macedonia in coordination with the private sector and the USAID. (Pursuant to the Program for Policies and Activities in Support of Entrepreneurship and Private Sector Competitiveness Building – adopted by the Government of the Republic of Macedonia in January 2003).

Since then the Government has participated with its highest representatives (ministerial level) in the NECC work and in its shaping as a tripartite forum for dialogue between the public, private and civil society sectors.

The initial project and financial support from the USAID was granted till 1 January 2006, by which time the NECC was expected to establish itself as an independent entity expediting the economic development of the Republic of Macedonia, and ensuring its sustainability under the umbrella of the Government of the Republic of Macedonia.

As of January 1, 2006 the NECC has been entirely independent, receiving only certain technical help from the Government of the Republic of Macedonia. This support, however, is insufficient in ensuring the implementation of its basic purpose, and efforts are being made to ensure independent financing of its Program Objectives to 2010, through project participation of the broader donor community and government institutions.

The shared vision of the bearers of the partners' dialogue in the NECC is the building of a common idea and culture of competitiveness of the Macedonian economy, by encompassing market competition, education and training, innovations and technological development in achieving a sustainable and dynamic development of Macedonian economy.

The basic objective of the NECC is to develop recommendations for strategies and activities towards improving competitiveness, productivity and entrepreneurship in all industries in the Republic of Macedonia, and thus create prosperity of the entire country.

Now that the transition processes were completed, and Macedonian economy enters the phase of consolidation and sophisticated conditions, competitiveness is a development factor of extreme importance towards which the most significant and largest economic programs and projects of the donors' community will be focused. The NECC has a particularly important place and role in the advancing of the processes of Euro-integration, in bringing Macedonian economy closer to the economies of the country-members of the European Union and achieving full integration of the Republic of Macedonia in the global economy.

To this end, the NECC has been developing its principal activities in the direction of:

- Identification of the obstacles to competitiveness development and presentation of a consensual platform for their overcoming – through ongoing expert research

carried out in cooperation with the World Economic Forum; preparation and yearly publication of the National Competitiveness Report;

- Support to realization and implementation of reform changes, European directives and all other necessary changes in existing policies, indispensable in achieving economic growth;
- Promotion of public awareness regarding the importance of competitiveness for the growth of the economy of Macedonia;

The NECC acts through its Assembly, which is the highest panel made of all NECC members. Its members are:

1. Public sector representatives: Government of the Republic of Macedonia - 6 ministers and Deputy Prime Minister for economic system, current and development policies (ex officio members)
2. Civil society representatives: representatives from academia, citizens' associations, expert and professional associations, and other organized forms of the civil society.
3. Private sector representatives: one representative from each of the chamber and other business associations and groups.

NECC Action Platform with 6 Working Committees :

1. **Committee on Competitiveness:** Analyzes the indexes from the Global Competitiveness Report prepared yearly by the World Economic Forum, and identifies the obstacles to domestic economy development. Organizes public debates, experts' round table discussions and prepares the annual National Competitiveness Report, suggesting specific measures and recommendations towards improving national competitiveness.
2. **Committee on Education:** Supports the activities for permanent education and expert consulting for enterprises, conducts analyses and delivers recommendations on ways to overcome the current discrepancy between the possibilities of the institutions of education and the businesses' needs for professionally trained labor force
3. **Committee on Regulations:** Research and cooperation with international projects and local experts and institutions towards building a favorable environment in which all business entities will be able to conduct honest and prosperous businesses on equal terms.
4. **Committee on Technological Development:** Works on a new *Policy for Technological Development of the Republic of Macedonia* that will bring together all entities in the efforts to bring the country technologically closer to the developed economies, while affirming innovativeness in the direct cooperation between the scientific-research centers and business sector..
5. **Committee on Clustering** Clustering - grouping plays a key role globally in promotion of competitiveness at a micro-level, at the level of enterprises, and should therefore be promoted and supported in Macedonia too. The Clustering Committee works on ensuring further support and dissemination of the positive experiences of the existing clusters to new clusters.
6. **Committee on International Activities – Donors and Budget:** The special task of this Committee will be to present in a most adequate way the NECC Platform and Program to all stakeholders – the Government, business community, donors etc., providing a general consensus and adequate financial support for their implementation.

With its wide range of activities, the National Entrepreneurship and Competitiveness Council (NECC) has been affirming itself daily as an efficient form in the creation of conditions that can enhance the development of a modern business climate and environment based on innovativeness and productivity.

For the purposes of establishing itself as a unique example of successful dialogue between the Government, business community and civil society, the NECC is expanding the platform of dialogue with strategic partners and signed agreements for strategic partnership with business associations in the Republic of Macedonia, and by incorporation of universities accredited in the Republic of Macedonia and representatives of the local self government.

Proposed Conclusions:

1. The Government of the Republic of Macedonia expresses its strategic interest in a more dynamic participation and realization of a dialogue between the private, public and civil sectors institutionalized through the National Entrepreneurship and Competitiveness Council.
2. The NECC is an advisory body and forum which reaffirms and implements the policies for economic growth, support to competitiveness and entrepreneurship.
3. In issues related to economic development, the Government of the Republic of Macedonia sees the NECC as an important advisory body and an extraordinary platform for the realization of a more dynamic, multi-layered and efficient exchange of opinions and communication of the partners with the aim of implementing the policy for economic growth of the country.
4. With the aim of implementing the set objectives, the NECC and the Government will establish additional forms of deepened cooperation and raise the cooperation to a level where the NECC will be used as a form of realization of public and private sectors dialogue and partnership.

APPENDIX B



MACEDONIA
COMPETITIVENESS ACTIVITY

TOURISM CLUSTER Re-establishes Inbound Tourism

Bringing foreign tour operators to Macedonia helped re-connect Macedonia as a tourist destination for international markets and significantly increase the number of foreign visitors.

+Inbound tourism between 2002 and 2005 has increased by 75% or over 197,000 arrivals in the country. The highest increases in foreign tourist arrivals are from Albania, Serbia and Montenegro, and Bosnia and Herzegovina.

The Tourism Cluster, under the guidance of the USAID's Macedonia Competitiveness Activity Project (MCA) conducted market research in 2003, then developed a strategy to capture "healthy, wealthy, experienced" tourists seeking nature/adventure or culture/history experiences. The marketing strategy included trade fair attendance, developing new promotional materials, hosting familiarization (fam) tours for international tour operators and travel writers, providing hospitality trainings and addressing Macedonia's interconnects.

MACEDONIA ON TOURIST OFFER

Cluster members reached beyond their borders to connect with foreign operators and travel writers, resulting in first-time offerings of Macedonia by several top international tour operators and publicity in major publications.

In spring and fall 2004, 15 tour operators from the US, UK, continental Europe and Turkey sampled Macedonia's warm hospitality and experienced the best it has to offer in culture and nature/adventure tourism. Although long lead times are typical in the

tourism industry, nine renowned international operators including Explore!, Old Country Tours and Regent Holidays from UK; Journeys International from USA; Urlaub und Natur and Cultureman from Germany; New Business Travel from Italy as well as Hike 'n' Sail and Middle Earth Travel from Turkey included Macedonia in their catalogs and tour offerings to clients in their itineraries for 2005 and 2007. In 2005 Macedonian travel agents continued to negotiate with foreign tour operators.



To re-focus cluster members on inbound tourism and the needs of demanding customers, MCA worked with them to develop tour itineraries; evaluate hotels, restaurants and "experiences" (existing and proposed tourist sites such as museums, churches and mosques, old markets, archeological ruins) using a scorecard system to capture customer feedback; establish a more customer centered service mentality; and clean up Macedonia's littered environment. Cooperation between MCA, the German development program GTZ, and the cluster resulted in a brochure featuring tours tailored for the hiker/biker or cultural tourist. In English and German, the brochure was presented at the Hannover Alternative Tourism Fair in Germany in early 2004 where cluster members made connections with tour operators who later attended their fam tour.



Tourism



MACEDONIA
COMPETITIVENESS ACTIVITY

LAMB & CHEESE CLUSTER Generates Exports



Macedonian dairies sent their first-ever cheese export in late 2003. It started with one dairy owner daring to do what was considered un-doable in 2003: find a buyer in the US and send a test shipment of Macedonian cheese. "If he can do it, so can I" was a frequent comment afterwards.

In 2005 alone, encouraged cluster members exported cheese products valued at nearly \$1 million to demanding customers in the US and Australia as well as regionally in Albania, Kosovo and Serbia. As the industry deepens its knowledge of the global cheese demand, the cheese export sales will continue to increase. Re-orders from satisfied international customers are already being negotiated.

• Total cheese exports 2003 - 2006 were more than \$1.1 million.

LARGEST DAIRY EXPANDS EXPORTS

IMB, the largest dairy in Macedonia, invested significantly in production improvements and added capacity that came on line in 2004. IMB worked with USAID/MCA to identify qualified leads for exports sales through participation in the SIAL 2004 Global

Food Show, organized by the project. Exports rose by 250 percent in 2005.

CLUSTER MEMBERS CHOOSE MARKET SEGMENTS AND PURSUE FOREIGN MARKETS

Shortly after the cluster's kick off in April 2004, both the dairies and sheep farmers began taking important steps that resulted in the first cheese exports. The cluster conducted consumer research and taste tests that helped producers modify their products to meet customer demand. The dairies obtained third country and EU export licenses, implemented HACCP quality standards and invested in quality, production, marketing, packaging and distribution improvements. Attendance at global and regional trade fairs significantly increased the dairies' contact with potential customers, and qualified leads were turned into new sales, with assistance from USAID/MCA.

These activities helped the industry adopt a new culture of exporting dairy and meat products to foreign markets by joint approach and strategic choice.

As there is no better place to make contacts and identify new export opportunities than global food trade fairs, MCA helped cluster members firm participation at food fairs into a regular activity. Satisfied with the feedback from SIAL, a few cluster members participated in the biggest international food trade show ANUGA in Germany in 2005.



Lamb & Cheese



MACEDONIA
COMPETITIVENESS ACTIVITY

DIGITAL MEDIA

The Promising Industry of Macedonia

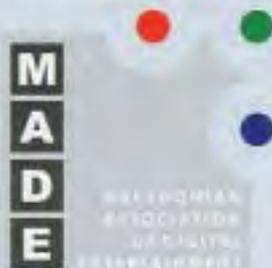
MCA helped create a new, identifiable, high-tech, international industry - digital media - in Macedonia. With a potential to service global industries ranging from entertainment to health care to manufacturing, the digital media industry leverages Macedonia's creative talent and educated workforce while offering hope to young people to reduce the "brain drain" so common in developing countries.

- Completed outsourced contracts in 2005 grew to approximately \$140,000.
- The industry has committed contracts in 2006 of about \$2 million and a pipeline of an additional \$2 million.

THE ROAD SIGN

USAID/MCA's work with digital media began with one company. This was a deviation from MCA's cluster approach to competitiveness to use a "lead company" model, the theory being that the success of a mimicked lead company would inspire others in a sector. In early 2004 MCA began working with the company to define, promote and brand the industry.

THE POWER OF ASSOCIATION



Initially focused on digital animation and special effects for the entertainment industry, the Digital Media Focus Group of the IT Cluster included 10 production and post-production companies. In June 2004, it later

expanded to include companies offering pre-production, production and post-production services. With MCA assistance, a new industry association, the Macedonian Association of Digital Entertainment (MADE) was formed in early 2005.

- MADE soon grew from 17 initial members to more than 35 who voluntarily joined the association in early 2006.
- The May 2005 launch of MADE showcased the talent and services that members have to offer potential international clients. It was attended by prominent government officials, donor representatives, clients, potential clients and a host of news media.

In 2005, MADE went through a strategic planning process, identifying three goals: increased exports, improved management capabilities and attracting foreign investment. MADE's Board established priorities and approved a plan to achieve its goals.

Local successes were promoted heavily and increased interest in the focus group. MADE membership included more than 25 companies at the end of 2005.

EXHIBITING AT INTERNATIONAL TRADE FAIRS 2004 & 2005



Digital Media



MACEDONIAN APPAREL COMPANIES Conquering European Markets

2005

2005 was a year of "first" for the Macedonian apparel industry

- First time that Macedonian apparel companies exhibited in Milan, arguably the most competitive fashion market in the world.
- First time that Macedonian apparel companies did a joint exhibition.
- First time that Macedonian companies prepared for an exhibit with a design consultant from the target market, new focused promotional materials, and targeting of specific customers (producers and retailers).
- First contracts with demanding new customers from new markets as a result of participation in three top Western European fashion trade fairs (Copenhagen, Milan and Madrid).



Choosing new high-end customers in the European market, instead of waiting for customers to choose Macedonian apparel companies, is a critical element of the Apparel Cluster's strategy.

Apparel cluster members are working together to build a competitive advantage for the industry based on improving its manufacturing capability (i.e., moving from CM to CMT and "Full Package" and "own-design" exports), increasing the flexibility of its manufacturing capability, creating proprietary designs, and developing strong Macedonian brands to allow Macedonian apparel to compete and win against lower cost competitors from Asia.

Cluster members are partnering to bid on a building in Štip that would become a fabric mill as well. Their decision was based in part on a feasibility study on the potential for a fabric mill in Macedonia conducted for the Apparel Cluster in mid-2005.

MACEDONIAN APPAREL COMPANIES EXHIBIT IN THE EUROPEAN FASHION CENTERS

• In the process of choosing attractive customers on the European market USAID's Macedonia Competitiveness Activity supported cluster companies' participation at major trade fairs in Copenhagen, Milan and Madrid.

CIFF in Copenhagen is the largest Northern European fashion fair. MCA took cluster companies to experience a major trade fair, see first hand how competitors present themselves and explore opportunities in Scandinavia. Six Macedonian apparel companies exhibited jointly at the March 2005 Milan "Ready to Show" fair, one of several important "firsts" for the Macedonian industry. The executive director of the Italian Association of Small and Medium Companies commended, "The way that the Macedonian companies present themselves tells us Italians that Macedonia cares about quality and style. This

Apparel

WINE CLUSTER

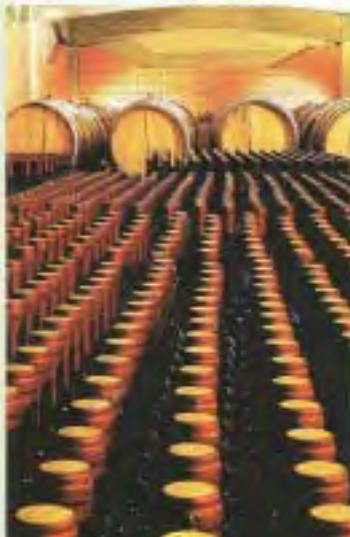
Increases Price of Bottled Wine by 40 %

Macedonia's fine wine-making tradition dates back in history to the days before Alexander the Great. However, more recently Macedonia has produced wines that were sold in bulk at low cost, largely to Germany, in keeping with the overarching goal to move up the value chain by selling higher value-added products to more demanding customers. USAID's Macedonia Competitiveness Activity (MCA) project support to Macedonia's wine industry has focused on quality and marketing improvements to facilitate increased sales of the country's high-end specialty wines in Europe. In only two years, since its formation in April 2004, cluster members have launched new varieties and are better able to compete with other regional and international wines.

- The average price of bottled wine has increased by 40 percent since 2003.

- Macedonian wineries have invested \$9 million in new facilities and equipment since 2003, an annual increase of 350 percent.

- Industry bottled wine exports of \$8.7 million in 2005, a 20 percent increase over the 2003 base year export figure.



IMPROVING RELATIONSHIP BETWEEN GRAPE GROWERS - WINE MAKERS

Quality wine begins in the vineyard where sunshine and terroir combine to produce grapes with the right chemical composition. USAID/MCA has fostered greater cooperation between growers and wineries to improve grape quality. With assistance from a US wine grower/consultant, a model purchasing contract based on quality standards was developed, distributed and discussed with wineries and growers in 2004.

While many of the smaller wineries have their own vineyards, others rely heavily on independent growers who are used to being paid on weight, not quality.



- One winery achieved modest success in 2004 by signing quality-based contracts with growers.

- In 2005, the winery signed more than 1700 such contracts with growers.

Other wineries have followed suit. This is an important first step towards building long-term cooperation between growers and wineries and will have a significant positive influence on wine quality in the long term.

Wine



НСПК
 НАЦИОНАЛЕН
 СОВЕТ ЗА
 ПРЕТПРИЕМНИШТВО И
 КОНКУРЕНТНОСТ

ЗОШТО НСПК?

Конкурентноста од аспект на економскиот развој претставува доминантно прашање како за приватниот сектор така и за владата на секоја земја. Со цел да се одржат високи нивоа на конкурентност, продуктивност и претприемништво, исклучително важно е јавниот и приватниот сектор тесно да соработуваат градејќи партнерски однос.

Успореден пристап на јавниот и приватниот сектор е неопходен и во градењето на ефикасни стратегии за да се унапредат извозната способност на македонското стопанство. При тоа се создаваат и услови во кои македонските претпријатија ќе можат да произведуваат комплексни производи и услуги со висока доддена вредност коишто ќе ги задоволуваат барањата на најсобрливите култури во светот, што всушност е клуч за ренесансаниот економски просторитет.

Националниот совет за претприемништво и конкурентност на Македонија (НСПК) е основан токму со цел да се изгради вакво партнерство што ќе придонесе за повисока конкурентност на македонското стопанство.

ШТО Е НСПК?

НСПК е трипартитно јавно-приватно тело составено од водечки личности од приватниот сектор, од владата и од граѓанското општество, кои го застапуваат и предводат спроведувањето на промените во политиката што се клучни за развојот на поконкурентни македонски претпријатија.

Примарната задача на членовите е заедно да работат во НСПК на изготвување на национални стратегии за подобрување на условите за деловно работење кои ќе им помогнат на македонските претпријатија, на кластерите и на другите активни деловни асоцијации да ги развијат, промовираат и извезуваат своите производи и услуги со висока вредност, и со тоа да создадат поголеми и растечки приходи за просечниот граѓанин на Македонија.

НСПК својата организациона поставеност и програмски активности ги остварува преку следните тела: Собрание, Управен одбор, Надзорен одбор, Советодавна група и 6 интерни комитети работни групи за: конкурентност, кластерско поврзување, едукација, технолошка подготвеност, регулатива, буџет и донатори.

Реализацијата на активностите НСПК ја спроведува преку приклучување кон Советот на претставници на сите постојни и идни кластери, деловни асоцијации, научно-образовни институции, големи деловни субјекти и претставници на локалната самоуправа.

Целта е преку воспоставување широк форум на заеднички интереси да се постигне вградување на микростратегиите од ниво на фирма, индустрија, кластер во макростратегијата на државата со поддршка на постојните, но и со воведување на нови индустриски гранки во македонската економија.

Консензус
 Дејствување
 резултати

APPENDIX C

APPENDIX D



FOR IMMEDIATE RELEASE

05/25/2008
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PRESS RELEASE

Macedonia Takes a Decisive Step to Fight Cyber Crime

Skopje, Macedonia – May 25, 2008 – This small Balkan republic may be the "mouse that roared" in the Internet marketplace. Macedonia recently made headlines when it became one of the first countries in the world to announce national wireless Internet access.

Now four of the country's largest ISPs (Internet services providers) plus the owner of the .mk domain have signed Declarations on Information Safety, the first step in a wider initiative to combat cyber crime in this southeastern European country – and to get the country off the "Internet black list."

The initiative is supported by the United States Agency for International Development (USAID), a part of the U.S. mission in Macedonia through its Macedonia Competitiveness Activity (USAID/MCA). The objective of the declaration is to secure and offer higher quality Internet services and to protect customers from global Internet security threats.

This recent ISP declaration is an important step in combating fraud, crime and other Internet-based illegal activity. Macedonia and USAID's efforts should serve as an example to other countries looking to maximize participation in the Internet community," said Brian Cufe, vice president, Public Policy, VeriSign, Inc.

Mountain View, California-based VeriSign, Inc. operates intelligent infrastructure services that enable and protect billions of interactions every day across the world's voice and data networks. VeriSign's Global Security Consulting team was engaged by USAID/MCA to gather information and conduct awareness workshops for Macedonian ISPs, financial institutions, Ministry of Internal Affairs, and Ministry of Justice. VeriSign identified multiple threats including bots and phishing.

The key consequence for Macedonia of cyber crime in the rest of Southeastern Europe is that Macedonia has an undeservedly poor reputation. "Macedonia's recent security partnership between industry and government is an important component in building the country's Internet reputation," said Brian Costello, vice president, Global Security Consulting, VeriSign, Inc.

The workshops were among the first steps in the process to take Macedonia off the black list which prevents Macedonian (.mk) domain-based computer users to conduct online financial transactions with key providers such as eBay, PayPal and Skype. Costello noted that "Although the number of Internet based transactions coming out of Macedonia is relatively small today, the recent ISP security declaration will go a long way in improving global Internet community perceptions."

Predrag Cemerikic, chief executive of On.net, a five-year-old ISP that recently made the country wireless, noted that "the initiative is essential to achieve international security standards for Macedonia to compete, offer and promote our products and services on the global Internet market." On.net has recently received the "ISP of the Year Award for Outstanding Innovation" at the European Press and Analyst Summit 2006.

Marta Tomovska, chief executive officer of Unet, said, "The declaration is an essential first step to protect our customers' information against unauthorized access so we can improve data integrity and introduce new services." Unet was the first Macedonian ISP and is the only satellite communication provider in Macedonia. It focuses primarily on the enterprise market.

"By signing the declaration, AD Makedonski Telekomunikacii proves its strong commitment to the development of Macedonia as an e-Society and the dedication for gaining and maintaining the confidence of its customers by providing the necessary level of protection of Internet services and protection of personal customer," said a representative of AD Makedonski Telekomunikacii, the largest ISP in the country.

"Once we announced that Neotel had signed the Declaration, we immediately received positive feedback from our clients. The banking sector, government institutions and insurance companies, which are some of our clients, showed their interest to bring our cooperation up to a higher level," said Blagojce Dimeski, CEO of Neotel, one of the leading young companies for the new Internet technologies in the country.

NOTES TO EDITORS:

USAID has invested over \$450 million in Macedonia since 1993. Over 20 projects worth more than \$30 million a year are currently being implemented. These projects are supporting Macedonia's transition to a free market-based, multi-ethnic democracy and are designed to accelerate economic growth, develop democratic institutions, and educate citizens for a competitive economy. To see more about what USAID is doing in Macedonia, please visit <http://macedonia.usaid.gov>

The goal of Macedonia Competitiveness Activity, USAID/Macedonia's largest economic growth project, is to build the prosperity of the average citizen by helping Macedonian enterprises generate the vision and actions that will result in their increased competitiveness in domestic, regional and international markets. To learn more about USAID/MCA, please visit www.mca.org.mk

Signatories of individualized Declarations on Information Safety are: Marta Tomovska, Chief Executive Officer, Unet; Borislav Popovski, PhD, president of the Management Board of MarNet; (MarNet is unit of St. Cyril and Methodius University in Skopje, which owns the .mk domain); Attila Szendrei, Chief Executive Officer of Makedonski Telekomunikacii AD; Predrag Cemerikic, Chief Operating Officer, On.net; and Blagojce Dimeski, Chief Executive Officer, NeoTel.

Bots are compromised servers used to launch cyber attacks or send spam messages. Phishing is the mass distribution of "spoofed" email messages which appear to come from legitimate financial institutions and are designed to lure recipients to divulge personal information ranging from account names and passwords to credit card numbers.

APPENDIX E

Special Selection

High quality wines from the TIKVEŠ Winery, created from selected highest quality grapes, which represent more than just a drink, but the very embodiment of the sun's radiance and the spirit of the south.

The Special Selection wines represent the perfect balance of tastes and aromas, satisfying all your senses...



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APPENDIX F



APPENDIX G

Global COMPLETE

Misión: Ser el líder en el mercado de productos de consumo masivo en el Perú, ofreciendo a nuestros clientes una amplia variedad de productos de alta calidad, innovadores y a precios competitivos.

Visión: Ser el líder en el mercado de productos de consumo masivo en el Perú, ofreciendo a nuestros clientes una amplia variedad de productos de alta calidad, innovadores y a precios competitivos.

Objetivos: Incrementar el volumen de ventas, mejorar la rentabilidad y fortalecer nuestra posición de liderazgo en el mercado.

Políticas: Mantener un alto nivel de integridad y ética en todas nuestras actividades, promoviendo el desarrollo sostenible y el bienestar de nuestra comunidad.

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Global

APPENDIX H



APPENDIX I

