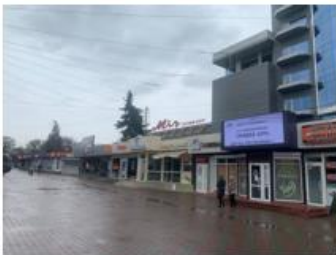
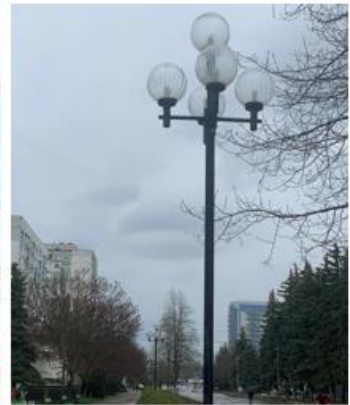


Location Analysis Balti



CINEMA - DTP327
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1. Purpose of the location analysis

As part of work package 1, CIMA's task is to perform an initial, general location analysis in all CINEMA pilot locations.

The main aspects and objectives of this location analysis can be summarised as following:

- ▶ professional assessment of the economic and urban development structures in the city centres of the 8 pilot locations
- ▶ on-site visits including inspection of the micro pilot locations for creative industries development
- ▶ evaluation of the economic effects and interactions of the creative industry projects on the inner-city structures
- ▶ professional input or comments for the planned pilot model in the creative industries
- ▶ conception of accompanying measures to make inner-city areas more attractive

Since it was **not possible to travel to Moldova from Austria due to the CoVid19 restrictions** during the second half of 2020, which are still ongoing in 2021, the site analysis is based on the following insights and results:

- ▶ results of the written surveys by CIMA, CIKE and HDS
- ▶ several online-meetings with project partners from Balti
- ▶ “city check” in form of a virtual tour, photographs and input from our PP on site in Balti
- ▶ "trend check" - evaluation of the city centre of Balti on the basis of 24 current trends in consumer- and location marketing, retail, gastronomy and residential sectors, also in close cooperation with the PP (online meeting)

- ▶ CIMA's many years of experience in the economic and urban development assessment of city centres and corresponding location benchmarks

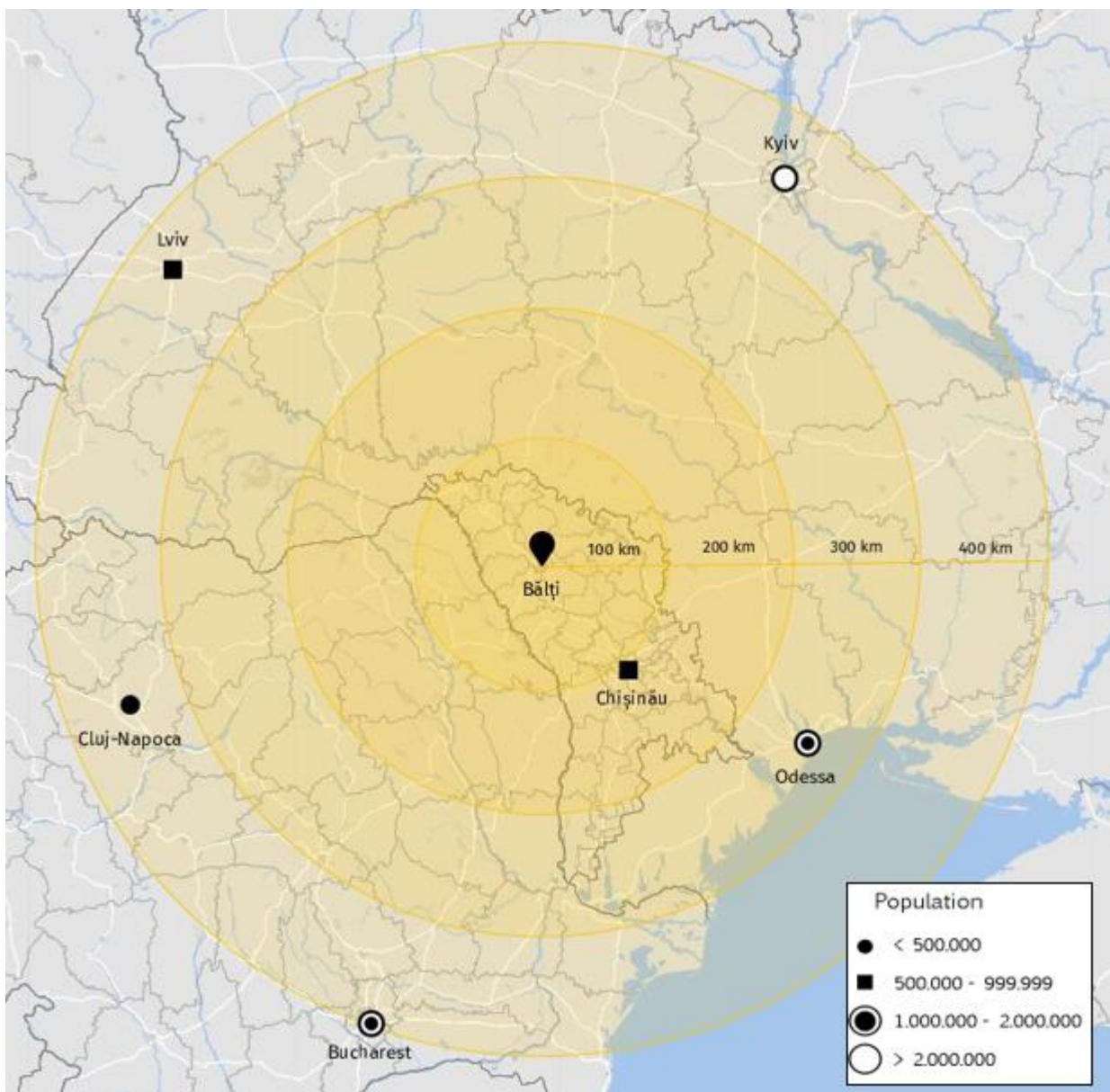
Due to the overall CINEMA project concept, the financial and time limits as well as the travel restrictions and therefore limited knowledge of the site, this location analysis is a first orientation guide, but **not a complete** (inner) urban development concept.



2. Facts and figures about Balti

2.1. General description

Balti is located 130 km north of Chisinau, where there is also the only international airport of the Republic of Moldova. It is the second largest city in the Republic of Moldova after Chisinau (if you do not count Tiraspol in Transsinnistra) and an important centre for business, culture and industry as well as the traffic hub in the northern part of Moldova.

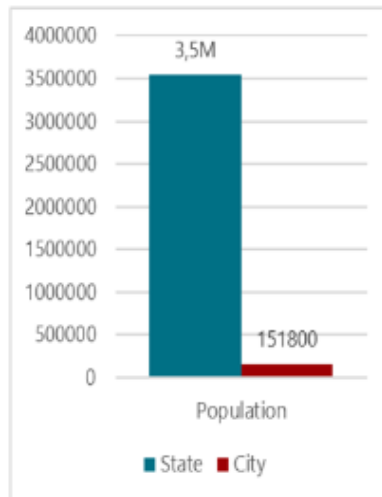


Source: www.mapz.com, adapted by CIMA, 2021

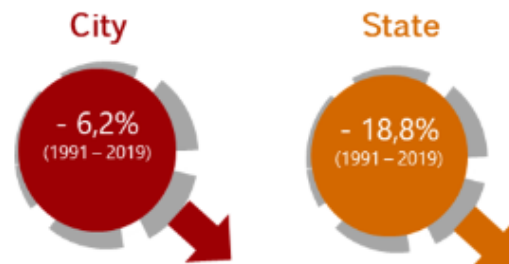
2.2. General location data

Bălți

Population



Population development



Retail businesses in the inner city



6 shopping centres and 2 (farmer's) markets in the inner-city

Economic data in the municipality

- Ø 298€ private net- income per capita per month in Balti
- 48.606 employees and 2.724 companies in the city
- -10,52% employees from 2011 - 2020



Source: National Bureau of Statistic of the Republic of Moldova 2020

2.3. Economic structure

The economy in the Republic of Moldova relies heavily on the agricultural sector (fruit, vegetables, wine export); also a strong sector is the textile production. The North Development Region (NDR) is among the best performing regions in the Republic of Moldova, where 98% of enterprises are SMEs, most of which are active in the commerce/trade as well as processing industry. There is also a strong progress in the industrial development, represented for example in the Industrial Park “Raut” and the Free Economic Zone Balti.

Tourism is not fully developed in Moldova. According to worlddata.info, the number of tourists in Moldova increased during the last years (till 2019), but numbers are still low with less than 180.000 tourists in the year 2019 (4.4 % of GNP). There are some emphases, for example on wine tourism, religious or cultural tourism and outdoor tourism.

2.4. Creative industries in Balti

The field of creative industries is quite young and only appeared recently. Most of them are located in the photo/video production and advertisement sector. The current support programmes are mainly on a national level (grants, national programme for start-ups etc.), as are certain policy agreements, like the “National programme in the fields of research and innovation for 2020-2023”. Non-financial support is provided by “[Artcor](#)” - a center for the development of the CI.

The **local hub** in Balti is the “[Smart Hub](#)”, which is a centre for consulting services in business and project management. The second hub is “[Business Hub](#)”, situated in the NDR and many more regional business incubators. There is also the **Business Consulting Centre**, which also offers services and information for business developments and monitors the general dynamics of investments in NDR.

The **European Creative Hubs Network** is also active in the Republic of Moldova, which is an international network. There are no regional creative networks.

The “[Sorintex](#)” cluster is a regional association of textile companies with the aim to integrate the cluster members (SMEs) into the regional, national and international value

chains and to increase their competitiveness through innovation, internationalisation, diversification, specialisation, optimisation of the production processes and networking.

Regarding digital clusters, there is the “**ACETI**” (Association for the Development of Electronic Communications and Information Technologies) and on the national level there is the “Moldova IT Park”, which is acting as a cluster facilitator.



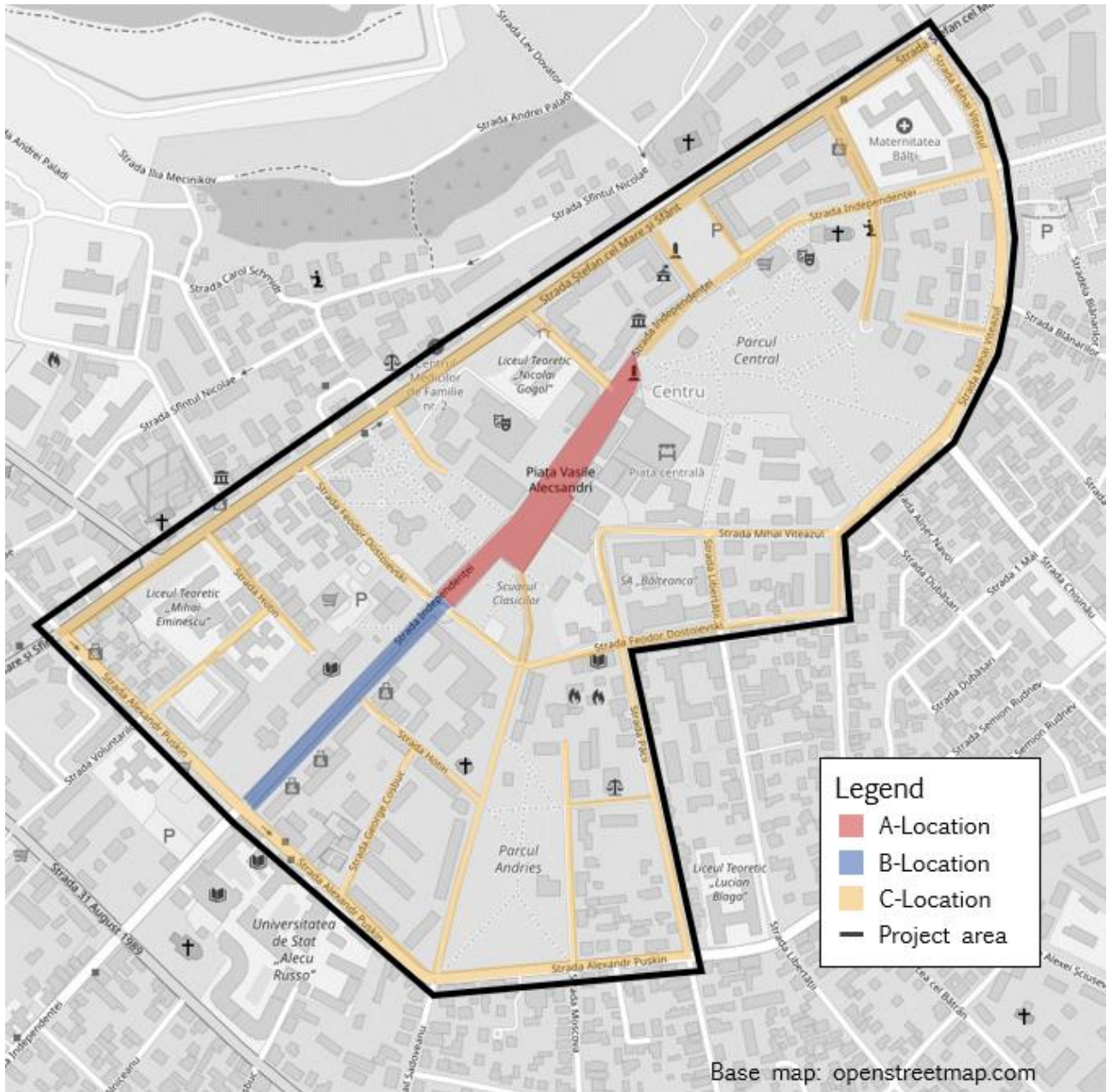
3. “City check” results

Since CIMA was unable to do the analysis in-situ, the city check was conducted through videos and photographs of the sites as well as Google Streetview. As there is no material from the 1C locations and little about the branch mix, a holistic and in-depth analysis - as on the other partner locations - was not possible. Therefore, this city check is merely a first orientation.

3.1. Classification of the inner city areas

In a first step, the streets, alleys and squares of the city centre were examined according to the individual property-economic location qualities. CIMA follows the classification criteria of the real estate industry and divides the city centre of Balti into the following three location qualities:

location qualities in city centres	description
1A	<ul style="list-style-type: none"> ▶ main shopping area of the city centre ▶ high pedestrian flow ▶ continuous use of the buildings at ground level as commercial space ▶ diversified mix of retail trade, gastronomy and personal services enterprises
1B	<ul style="list-style-type: none"> ▶ significantly lower pedestrian flow ▶ visible gaps of business-oriented ground floor use
1C	<ul style="list-style-type: none"> ▶ low pedestrian flow ▶ frequently accumulation of empty spaces ▶ usually presence of retail companies with special product ranges and high percentage of repeat clients



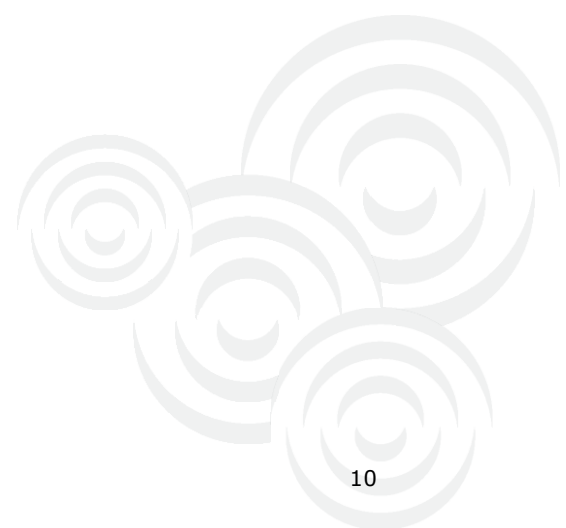
Source: Openstreetmap.com, adapted by CIMA (2021)

The project area and therefore the defined inner-city area in Balti is located between the main street “Strada Stefan cel Mare si Sfint” in the north, the “Strada Mihai Viteazul” in the south-east and the “Strada Feodor Dostoievski” in the south-west.

The main location in Balti centre is the “Plata Vasile Alecsandri” and “Strada Independentei”. The stretch between “Strada 26 Martie 1944” and “Strada Feodor Dostoievski” can be considered a 1A location, afterwards until “Strada Alexandr Puskin”

it is a good 1B location. The street is here divided by stripes of greenery and broad sidewalks. Some cafés and small shops are located between living quarters and small islands of greenery. Most of the entertainment, culture, service providers, retail and gastronomy is located at the main square “Plata Vasile Alecsandri” and the park located there. One of the main shopping centres “Univermag” is also situated here. The main bus station “Centru” is just across the park.

The other streets within the project area are considered 1C location, with less economic offer, less footfall and an increase in living quarters and constructional gaps.



3.2. Assessment of the inner city quality

Based on the criteria set, CIMA assesses the inner-city qualities in the following way:

“city check” criteria	description
city greening	▶ “islands” of greenery
illumination design	▶ partly illumination design in the inner-city areas ▶ street lamps and some illumination of buildings at night
city furniture	▶ different kind of benches
cleanliness	▶ most central areas are quite clean
surface design	▶ different surfaces, like stone tiles and asphalt
house facades	▶ some houses in the whole inner-city area needs to be renovated, but in the very central (1A) locations, the facades are mostly in a good to very good condition
barrier free design	▶ partly barrier free ▶ some buildings are not barrier free
pavement width	▶ in the inner city area (main streets) very broad
pedestrian safety	▶ most of the centre is very safe for pedestrians (pedestrian zones, broad pavements etc.)
parking facilities	▶ there are some (smaller) over-ground parking places around the city centre, further parking possibilities are located along the streets
traffic and signposting	▶ no guiding system for parking ▶ there is no signposting for pedestrians
usability for events	▶ generally possible, especially in the parks and the main square “Plata Vasile Alecsandri”

A final evaluation of the urban development structures of inner-city area shows the following result:

	1	2	3	4	5
overall impression of the city centre ambience			●		
quality and density of retail trade			●		
quality and density of gastronomy				●	
cleanliness		●			
city greening	●				
illumination design			●		
surface design & condition			●		
presence and condition of monuments		●			
house facades and building conditions			●		
density and condition of traffic/signposting					●

(evaluation by school notes: 1 = very good; 5 = very bad)

3.3. Further comments to the city centre quality

The inner-city centre of Balti has an above average part of greenery (parks, stripes of greenery etc.), which are in a general good state of maintenance (it also depends on the time of the year). The surface sometimes needs some repairing, there are several potholes on the streets. The illumination design is practical; the cleanliness in the central area is quite good.

The central square shows a very good mix of commerce, service, leisure and culture offers. There are also several museums, cultural and educational facilities either in the city-centre or very close by. The house facades are generally in a good condition in the central area.



3.4. Trend check

City centres are - similar to companies - in a multifaceted competition for customers, tourists, investments in private and public infrastructures and projects, as well as companies willing to settle, and much more. Naturally, these inner-city economic areas are also subject to different developments. With regard to the most efficient and sustainable active location marketing and empty space management possible, this chapter of the location analysis highlights the most important current and future 24 European trends relevant to small and medium sized city centres. For the responsible decision makers in Balti this “trend check” should be a quick and general orientation aid how “trendy” the city centre is.

Balti’s trend affinity is assessed using a simple traffic light system:

“trend check” colour	description
	<ul style="list-style-type: none"> ▶ no “trend affinity” ▶ (still no trend approaches visible)
	<ul style="list-style-type: none"> ▶ moderate “trend affinity” ▶ first trend approaches visible
	<ul style="list-style-type: none"> ▶ high “trend affinity” ▶ city centre is right on trend



location trends	trend affinity		
Trend 1 - Shopping experience The city as a networked experience shopping location (shopping, culture, gastronomy, services) with emotional stimulation	Green	Yellow	White
Trend 2 - Service as a chance to distinguish yourself Clear profiling of inner city retail via top service and specialist advice	White	Yellow	Red
Trend 3 - New city centre affine target groups Addressing new inner city target groups such as LOHAS, DINKs, silver surfers, etc.	White	White	Red
Trend 4 - Multi- & cross-channel Online and offline multi- and cross-channel strategies of local companies are considered a major competitive advantage of city centres	White	Yellow	White
Trend 5 - New retail city formats e.g.: convenience-shops (products to go) and sustainability-shops (e.g.: repairshops)	White	Yellow	Red
Trend 6 - Worlds of food enjoyment High quality specialist suppliers in the food sector in combination with tastings	White	White	Red
Trend 7 - owner-managed flagships High-quality, interesting products combined with lifestyle and/or feel-good concepts	White	White	Red
Trend 8 - Digitalisation of sales areas Digital technologies and "location based services" determine shop concepts	White	White	Red
Trend 9 - Investment boom for city hotels New city hotel concepts contribute to the offer mix of a city or city centre	Green	Yellow	White
Trend 10 - Alternative accommodation concepts e.g.: albergo diffuso for subsequent use of vacant residential and business units	White	White	Red
Trend 11 - Experience and theme gastronomy Food as an experience by involving the guests in the preparation as well as special catering locations	White	Yellow	White
Trend 12 - Urban gastronomy concepts Various food concepts such as. Infinite food, spiritual food, etc. reflect the lifestyles of various inner city centre target groups	White	White	Red
Trend 13 - Day Tourism - Positioning Clear, day-tourist positioning of city centres as a strategy for additional absorption of purchasing power	White	White	Red
Trend 14 - Leisure structures in the inner city Sports and leisure infrastructures are returning to the city centres such as motor parks, amusement arcades, cinemas, etc.	White	White	Red
Trend 15 - Local quality labels Local quality labels strengthen competitiveness and help SMEs to position themselves	White	White	Red
Trend 16 - Co-working Alternative vacancy utilisation through co-working spaces and (ideally) simultaneous promotion of the creative industries	White	White	Red
Trend 17 - Educational institution as impulse generator Schools, nursery schools and universities are increasingly returning to the city centres	Green	White	White
Trend 18 - "one stop shop"- town centre marketing A professionalised town centre marketing with integration of location, tourism and cultural marketing agendas	White	White	Red
Trend 19 - Cultural sites as "landmarks" Architecturally sophisticated event locations or museums become inner-city magnet points	White	White	Red

location trends	trend affinity		
Trend 20 - Image-shaping events The city as a stage or playground for new events in the leisure and cultural sector		Yellow	
Trend 21 - Media libraries Increased development of municipal libraries in the digital field as a multifunctional educational centre			Red
Trend 22 - Digital city paths Communicating urban history and culture through "virtual" circular routes			Red
Trend 23 - Innovative forms of inner-city living New inner-city housing forms for different target groups such as: temporary housing, micro-apartments, modern heritage			Red
Trend 24 - Attractive "start up" scene The city centre as attractive location for young company founders		Yellow	

Further comments

The shopping experience has been described as good, with a broad offer of retail stores/shopping centres, culture and gastronomy. The chance to distinguish oneself by special services has not been used in Balti, also, new target groups are not attracted.

There are first tendencies towards multi and cross channel stores (some online shops) as well as new retail city formats. The digitalisation of sales areas has not proceeded yet. There are also no flagship stores.

Specialist stores with degustation and quality consulting as well as new urban gastronomy concepts cannot be found in the city centre of Balti. There are, however, first tendencies towards an experience gastronomy.

Regarding accommodation, two new city hotels are in the implementation phase, but there are no alternative accommodation concepts, like albergo diffuso etc. The touristic positioning is quite weak, as is the leisure infrastructure in the inner city of Balti.

Cultural landmarks are scarce; there are no digital city paths and no city marketing.

While there are several educational institutions located in the city centre, the start-up scene is very small and there are currently no spaces for co-working.

4. The Pilot location/project

4.1. Concrete contents of the pilot model

The information about the piloting project “**Balti Innovation Centre**” has been provided by the ADR Nord and the municipality of Balti. This is the official **project description**:

Centre of Innovation and Technological Transfer

“Moldova Competitiveness Project, together with Balti State University “Alecu Russo” and North Regional Development Agency will revitalize a building located in the University into a Regional Innovation Hub (RIH) in order to serve as an innovation and economic accelerator for the North Region of the country. The Regional Innovation Hub and the Community Innovation Centre will provide not only an access to the technology, but will support new initiatives, projects and products. It will also serve as a networking place for the people with different interests in order to cooperate with business, academia and government for a better future.”

The **main frame conditions** are summarised as follows:

content	description
general targets	<ul style="list-style-type: none"> ▶ development and promotion of research, innovation and technology transfer infrastructure in the North Region of Moldova for IT and engineering industries ▶ support and development of start-ups in the field of innovative business ▶ creation of a collaboration platform between the business environment and education environment
contrast to conventional local support models	<ul style="list-style-type: none"> ▶ theoretical and practical learning/training experience for students from all institutions and sectors ▶ possibility to meet and interact with businesses and the labour market

	<ul style="list-style-type: none"> ▶ elaboration of joint programmes with the private sector such as training programmes ▶ incubation and acceleration of micro enterprises ▶ testing and prototyping of new project ideas ▶ support for the transformation of student projects into real businesses ▶ access to financing for innovative projects
target groups	<ul style="list-style-type: none"> ▶ pupils and students ▶ IT companies from Balti ▶ freelancers ▶ automotive companies (from Balti Free Economic Zone) ▶ CI companies
single components	<ul style="list-style-type: none"> ▶ approx. 500 m² manufacturing and prototyping laboratories (3D modelling and printing, laser, CNC etc.) ▶ approx. 300 m² training spaces ▶ approx. 100 m² co-working spaces ▶ approx. 400 m² canteen/café/reception and meeting rooms ▶ approx. 300 m² incubators and accelerator programmes ▶ approx. 450 m² event and conference space ▶ approx. 1,000 m² space for IT and innovation companies



content	description
network partners	<ul style="list-style-type: none"> ▶ Balti City Hall ▶ Balti State University “Alecu Russo” ▶ North Regional Development Agency ▶ Regional Innovation Hub ▶ Ministry of Agriculture, Regional Development and Environment ▶ Ministry of Education, Culture and Research ▶ Ministry of Economy and Infrastructure ▶ National Association of ICT Companies (ATIC) ▶ Employers' Association in the Manufacturing Industry (APIP) ▶ US Aid ▶ Suedia Sverige ▶ UK Aid ▶ Moldova Automotive Cluster ▶ Competitive Project Moldova
application period	<ul style="list-style-type: none"> ▶ start August 20th, 2020 ▶ (proposed) end October, 2021
cost elements	<p>total budget</p> <ul style="list-style-type: none"> ▶ 37.54 mio. lei = 7.62 mio. Euro <p>of which 28.50 mio. lei are provided by the “National fund for regional development”</p>

The following plans and photos have been provided by ADR Nord:

