Последние два направления являются приоритетными и без их реализации образование всегда будет «догоняющим», а не «опережающим». Только в том случае, если будет изменен Госстандарт и учебные планы в сторону практико-ориентированного образования, можно надеяться на подготовку специалистов, востребованных повсеместно и в неограниченном объеме. Современная стратегия перехода к новому качеству подготовки специалиста является основной составляющей единого стратегического плана модернизации общества.

PREROGATIVES OF MOLDOVA'S WINE INDUSTRY REGARDING ASSURANCE OF THE COMPETITIVE ADVANTAGE AT THE FOREIGN MARKET

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Wine has traditionally been an important export for Moldova. The temperate climate is ideal for grapes, and as much as 10 percent of the arable land has been planted with vineyards over the years. During Soviet times, Moldovan wine was widely consumed throughout the USSR, with a strong brand identity. After independence, however, exports to other destinations have not grown substantially.

This paper examines the experiences of wine-exporting countries and contrasts them with prospects for the Republic of Moldova wine exports. After a review of global trade in wine over the past few decades, three groups of countries are contrasted. *The first group* includes four new big exporters: Argentina, Australia, Chile, and New Zealand. These countries have very quickly expanded both production and exports, with sustained growth rates of roughly 30 percent for over fifteen years, while improving quality at the same time. *The second group* includes Eastern European countries: Bulgaria, Hungary, Moldova, and Romania. Growth has been stagnant, or negative in this group, due to the challenges of restructuring industries after the end of collective agriculture. *The third group* offers a cautionary tale, and includes Northern African countries: Algeria, Morocco, and Tunisia [3, p.55].

Both wine production techniques and export patterns have changed significantly over the last thirty years. Advances in technology allow for more control over the production process, and thus over the finished product. This has allowed the quality and consistency of even cheap wine to be improved, making competition more difficult, but also expanding the market. The new techniques have been adopted with great success by several countries, with large increases in exports.

For the Republic of Moldova we have to mention that in March 2006, Russia imposed a ban on imports of Moldovan wine**.** As wine exports were more than 10 percent of GDP and 80 percent of all wine went to Russia, this was a severe balance of payments shock. Exports in 2004 was almost $278 million, in 2005 – $233,8 million, in 2006 – $133,7 million, in $2007 – 78,1 million and in 2008– $193 million. Wine exports to Russia have resumed as of October 2007, but recovery is likely to be gradual. The original dispute was over the sanitary certification of wine, and administrative procedures by the Russian authorities are now more stringent.

One of the most important determinants of wine quality is grape quality, implying high labor costs. Although some industrial countries such as Australia are moving to mechanical picking of grapes, higher quality vineyards rely on hand-picking, like is implemented in the production of a German dessert wine from Trockenbeerenauslese, which requires, that grapes be individually picked to qualify for that label. This can greatly increase the labor cost, which can be a significant fraction of operating costs. For example a 1992 study of costs for Sonoma County, CA vineyards calculated labor costs to be roughly half of operating costs.

As Moldova has generally low labor costs and a large number of workers with experience in picking grapes, many families maintain vineyards for personal use; this could be a significant competitive advantage. While this could imply that large-scale, integrated vineyards and wineries are needed, some countries, notably Germany, still rely on cooperatives to produce grapes [7, p.77].

However, technological advances in winemaking also necessitate capital investments. Modern winemaking techniques rely heavily on laboratory testing to assess the characteristics and of pressed grapes, and make decisions about blending batches for consistency. This also requires a controlled fermentation environment, and the associated equipment. Although Moldova has the lowest wages using manufacturing wages as a proxy for wages in general, this is not enough—the World Bank cost of doing business indicators rank it almost as poorly as Argentina, and well below other Eastern European countries (table 1).

Table 1

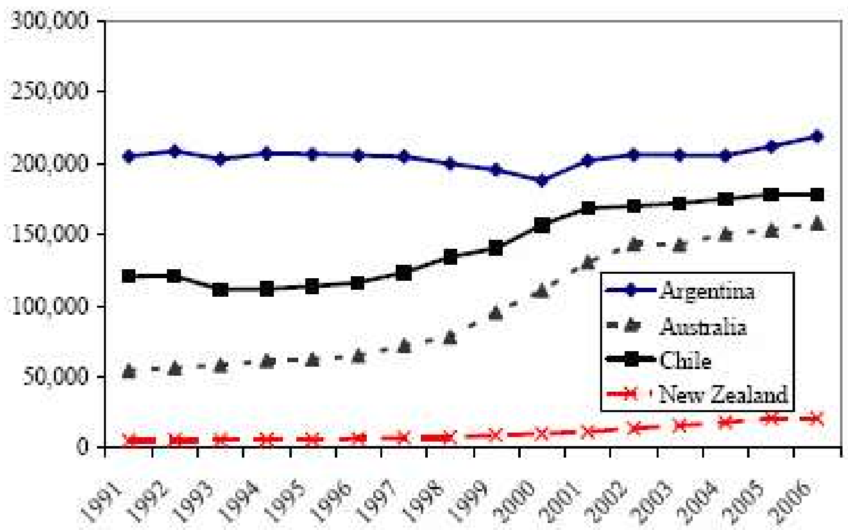
Table IV.1. Competitiveness Indicators

Country	Manufacturing Wages (US $)	Doing Business, Rank		
		2007	2008	2009
Argentina	3.17	109	175	174
Australia	19.11	9	80	70
Chile	2.84	33	101	100
New Zealand	12.72	2	62	63
Bulgaria	1.34	46	96	105
Hungary	5.20	45	94	105
Moldova	0.91	92	159	164
Romania	2.01	48	96	107

Sources: International Labor Organization, World Bank, Doing Business, 2009.

Skilled oenologists are needed to apply these techniques, although turnaround times can be quite short. There are now degree-granting programs in a number of the new wine regions, such as Australia and California that train vintners in these more industrial techniques. Due to the difference in seasons between the Southern and Northern Hemispheres, some vintners have begun to consult for multiple wineries in one year.

Figure 1. Hectares of Grapes Planted

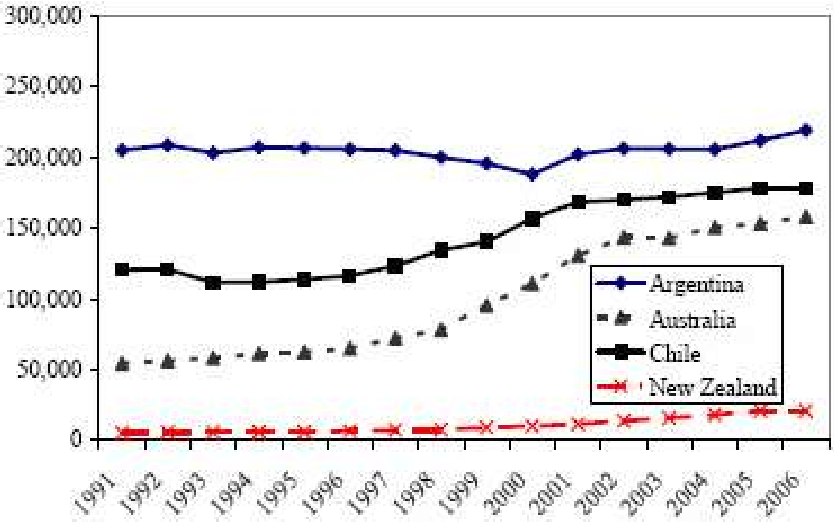


Source: Food and Agriculture Organization

This allows for faster technological diffusion, and can quickly raise the quality of wine produced [6, p.139–168]. With the rise in labeling by wine varietals, it has become easier to introduce new wines. Wines and spirits from are accorded special protection under the World Trade Organization, and products associated with geographic regions are only allowed to be labeled as such if they are made in those regions. For example, champagne can only be made in the Champagne region in France, and sherry can only be made in Jerez in Spain, article 23 of the Trade-Related aspects of Intellectual Property Rights (TRIPS) agreement. To get around this, California producers began to label wine according to the primary grape varietals, such as Cabernet Sauvignon. This allowed for comparisons before tasting, making it easier to try a familiar grape from a new place.

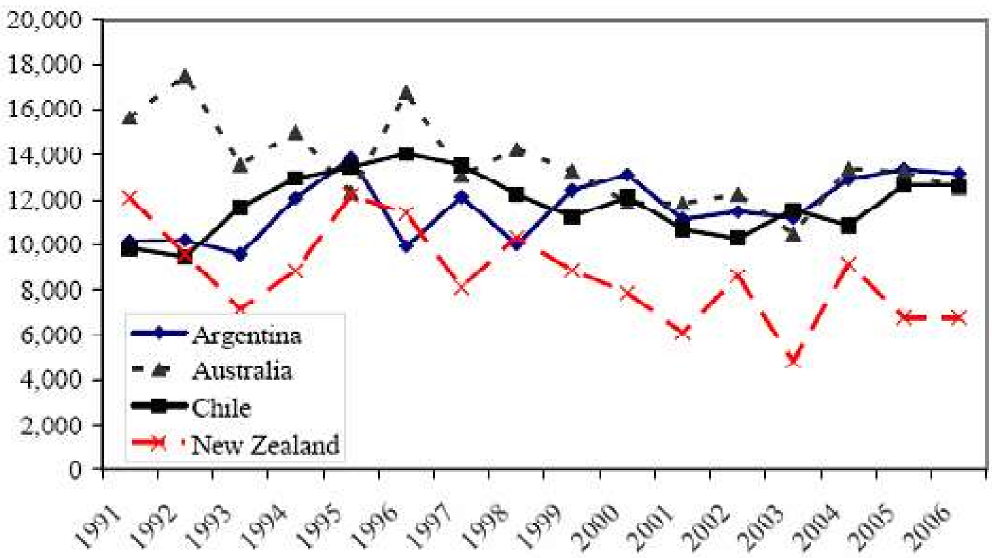
Hectares of grapes planted give some indication of the possible scope for wine production in a country. Both the big new wine exporters and the Eastern European countries have similar areas planted. While this does not directly translate into production levels, it is a rough indication of how far the industry could expand. However, the quality of plantings can vary a great deal. Incentives to only increase hectares planted could, in fact, be counterproductive without the appropriate incentives for quality. Finally, plantings do not always translate into harvested grapes.

Figure 2. Hectares of Grapes Planted



Source: Food and Agriculture Organization.

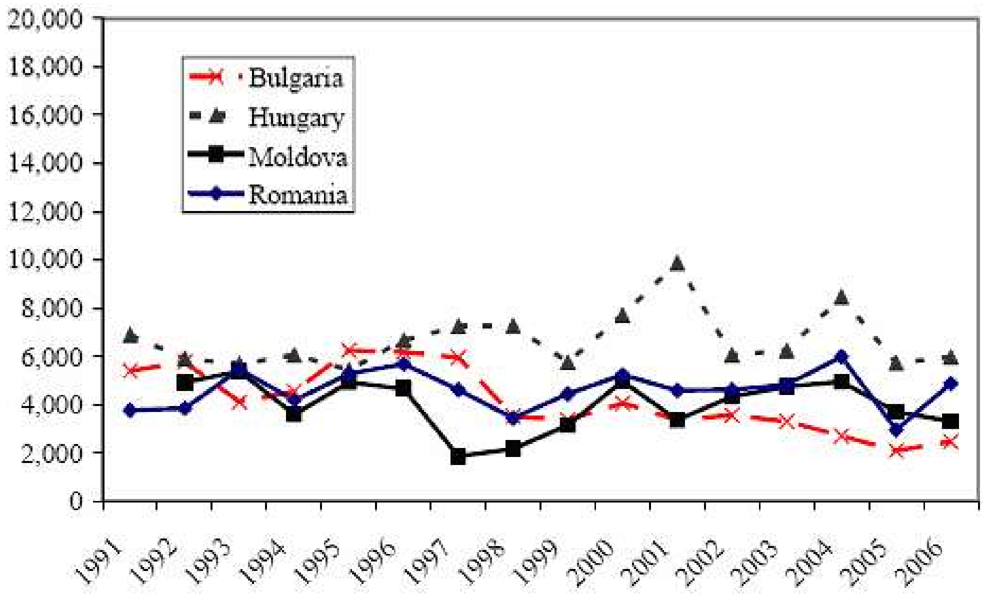
Figure 3. Pounds of Grapes per Hectare



Source: Food and Agriculture Organization.

Grape yields per hectare give some indication of vineyard productivity, although there are important caveats. These caveats include intensity of cultivation, grape variety, climate, and whether green harvesting is practiced,whereby excess bunches are harvested early to raise quality of the remaining grapes. Yields in the big new wine producers tend to be higher than in Eastern European countries [8, p.101]. Although many of the Eastern European countries have older, less productive vineyards, they also have vineyards that are not actively managed or harvested, lowering the estimated yield, calculated from the grape harvest and hectares planted. On the other hand, yield is also an indicator that should be targeted with caution. For example, New Zealand has lower yields than Argentina, Australia, or Chile, which reflects both vineyard management choices and grape variety. If the objective is to maximize profits,incentives to quality trump volume targets. Despite the dominance of a handful of exporters, the mix of countries has evolved over time. Traditional European producers such as France, Italy, Spain, Germany, and Portugal remain on the list for all years in the table 2. However, the second-largest exporter in 1966, Algeria, disappears from the list before 1986, and newer producers Australia, Chile, and the USA make an appearance after 1986.

Figure 4. Pounds of Grapes per Hectare



Source: Food and Agriculture Organization.

Moldova makes an appearance in 1996, but is soon overtaken by other producers. Despite the growth in exports, wine consumption by volume has been declining. Particularly in countries with a long tradition of winemaking, this has forced countries to pursue exporting. As much of the decline in consumption has been in everyday table wine,producers are also shifting into higher quality wines,which are less price-sensitive in the export market [2, p.99].

Table 2

Wine Exporter Rank	1966	1976	1986	1996	2006
1	France	France	France	France	France
2	Algeria	Italy	Italy	Italy	Italy
3	Italy	Spain	Spain	Spain	Australia
4	Spain	Germany	Germany	Portugal	Spain
5	Portugal	Portugal	Portugal	Germany	Chile
6	Morocco	Algeria	Yugoslavia	Australia	Germany
7	Germany	Yugoslavia	USSR	USA	USA
8	Tunisia	Greece	Greece	Chile	Portugal
9	Yugoslavia	Austria	Hungary	Moldova	South Africa
10	Belgium	Hungary	Belgium	South Africa	New Zealand

Source: UN Comtrade.

The experiences of different groups of countries offer some lessons for Moldovan wine exports. The big new exporters have grown very quickly,both in value terms and the number of destinations. They also tend to be larger and richer, with more developed financial institutions. The Eastern European countries have had a more difficult time since the breakup of the Soviet Union, but show some signs of recovery [1, p.99]. The Northern African countries, despite having large exports to France historically, were never able to become permanent players in the wine market. Of particular interest is how quickly these changes took place,and through which channels. Exports may increase due to more export destinations,increases in quantity,or higher prices. The most successful exporters pursued a combination of all three, suggesting high levels of innovation in the industry.

Overall export growth masks some important variations at the country level. Annual growth for a country is not always positive, and exports to various destinations can also grow or shrink. The table 3 gives an indication of how wide these variations can be, with summary statistics for destinations that were added after 1984, but received exports for at least two years, with the additional restriction that exports the previous year were at least $250,000, this minimizes the high growth rates associated with a low base.

Table 3

Wine Export Growth to New Destinations, 1984 to 2000 (in percent)

Country	Average	Standard Dev.	Minimum	Maximum	Observations
Argentina	26.3	67.1	-96.8	273.6	146
Australia	26.9	65.6	-89.5	402.8	124
Chile	35.5	71.6	-77.1	763.9	256
New Zealand	25,6	68.3	-70.1	266.3	75
Bulgaria	13.9	97.5	-95.7	583.6	67
Hungary	-2.4	70.4	-93.5	229.4	65
Moldova	-10.0	84.3	-89.4	305.9	33
Romania	23.0	156.0	-96.8	1,170.6	69

Source: UN-NBER World Trade Flows.

While the big new exporters have high average growth rates, all the countries have large standard deviations and wide ranges between minimum and maximum growth rates. As these are country-level flows, the variation in growth rates at the firm level is likely to be even more volatile. This underlines the inherent riskiness of export growth at the disaggregated level, and underscores the need for a financial sector and business environment that can cope with such risks.

Australia is the most successful of the big new wine exporters. In 2006, it displaced Spain as the third largest wine exporter in the world, and now exports more than $2 billion. A few decades ago, Australian wine was relatively unknown, in contrast with its current high reputation. In response, Australian firms set up marketing subsidiaries to distribute their wines in the U.S., which helped them achieve market penetration. Once retail outlets were more familiar with the wines, however, the wineries moved towards direct sales, cutting out the distributional channel [9, p.1080-86]. As it can be an expensive proposition for a winery to set up a subsidiary in a foreign country, the experience of Australian wines shows that it can be a used as a springboard for more decentralized exports later. High levels of research and development expenditure have also helped to make Australia a world leader, but with more accredited winemakers, it is also easier for other countries to benefit.

Moldova still faces some impediments to export growth, but is well placed to compete. The accession of Bulgaria and Romania to the EU in 2007 complicated Moldova's diversification of export destinations. Previously, Moldova had duty-free access to Bulgaria and Romania through the Central European Free Trade Agreement (CEFTA), in addition to access to CIS countries through a separate FTA. However, duty-free access was granted to Moldovan wine beginning in March 2008 (subject to generous quotas), after an Autonomous Trade Preferences agreement between the EU and Moldova comes into force.

Sustained growth, such as experienced by Chile, would contribute hugely to Moldova's development. Although counterfactuals should always be interpreted with caution, if wine exports grew by 18 percent a year for twelve years beginning in 2008, overall wine exports would be almost $1 billion in 2019. Moldovan wine exports in 2006 were roughly $136 million, and Chilean wine exports in 1993 were $129 million. Chilean wine export growth from 1994 to 2006 averaged 18 percent. Exports overall grew by roughly 44 percent in 2008, in comparison with 2006 although this partially reflected a rebound after the 2006 Russian ban on imports of Moldovan wine. An important caveat is that Chile's economy is much larger than Moldova's Chilean GDP was over $100 billion in 2007, in contrast to $4.2 billion of the Republic of Moldova, with a more developed financial sector, allowing for higher levels of investment. On the other hand, the world wine market certainly seems able to absorb such large increases in exports.

Conclusion

This article surveys the experience of other wine exporters for lessons for Moldova. The big new exporters, comprising Argentina, Australia, Chile, and New Zealand, have experienced sustained, double-digit growth in wine exports over two decades. The institutional environments and growth strategies of the big new exporters differ, but technological advances and continuing investments are key to sustained growth. However, the overall growth masks some significant volatility in bilateral flows, implying the need for a financial sector and business environment that can cope with significant risk and support innovation. The experiences of other Eastern European countries bears this out; after the breakup of the Soviet Union, Bulgaria, Hungary, and Romania were unable to reorient towards more lucrative markets. The experiences of the Northern African countries follow a similar pattern after the weakening of their ties with France.

Moldova is well placed to expand exports of wine to new markets. With a long tradition of winemaking, low labor costs, and a favorable climate, as well as advantageous access to both CIS and EU countries, export growth could accelerate over the near term. The strategy pursued by the government in streamlining regulations could also bear fruit in the wine sector, given the needs for investments and new technology. Despite the romantic image of the industry, it is clear from other countries experiences that wine has much more in common with industrial goods than with agricultural commodities. Capital investments, marketing, and distribution networks are all crucial to export success. While there are economies of scale to marketing and distribution initially, in other countries much of the innovation has been driven by smaller firms. All these factors point to the continuing need to improve Moldova's business environment.

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ДИЗАЙН НЕОГРАНИЧЕННЫХ ВОЗМОЖНОСТЕЙ

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Сегодня в дизайне сформировалась ситуация, синтезирующая характерные черты предыдущих эпох и движений. Цифровая революция, технический прогресс и популяризирующие процессы в культуре стали стимулом к появлению новых предметов демократичных, привлекательных, направленных навстречу потребителю, созданных для того, чтобы сделать жизнь человека лучше.

Предметы в их новых формах и сущности отражают изменившееся визуальное восприятие мира человеком. С помощью дизайнеров сами предметы меняют восприятие большого количества людей, их отношение к материальному миру в целом, так называемую ежедневную бытовую философию. Произведения дизайнерского искусства находятся среди нас, в нашей повседневной жизни, для современного человека практически невозможно избежать контакта с ними. Даже если его жилое пространство обставлено в традиционном стиле, он пользуется мобильным телефоном, использует новейшие средства-носители информации, и может попасть в современный интерьер с дизайнерскими предметами в любой момент, начиная с похода в гости и заканчивая виртуальным посещением художественного объекта мира. Сегодня же, вследствие проникновения цифровых технологий в жизнь человека, у проектировщиков зачастую и не возникает мысли о физическом воплощении объекта. Виртуальная реальность заменяет физическую и сегодня многие продукты могут существовать вне плоскости реального мира. В пример можно привести здание виртуального музея Гуггенхайма, спроектированное группой Asymptote, которое будет существовать исключительно в пространстве интернета и его реальное воплощение не предполагается [1]. Началом этого явления стали множество виртуальных музеев, библиотек и других общественных заведений, т.е. социальные объекты, развившиеся от реальных общественных зданий, и существовавшие на границе реального и виртуального пространства, однако сегодня все более актуальными становятся институты, существующие только в киберпространстве.

Таким образом, теория Брюса Стерлинга о развитии объекта кажется все более реальной, ведь для посещения виртуального музея или библиотеки человеку не нужно иметь много денег, ему не нужно перемещаться в пространстве и выделять большое количество времени, более того, ему не нужно