





# CIVITTA

ANNUAL  
REVIEW  
2020

# FOREWORD

We started our journey in Estonia – home of the world’s most digitally advanced society (e-Estonia) and a world-class start-up ecosystem. We noticed that in small countries it is hard to access competitive and high-quality management consulting services: local companies are too small to offer everything clients need, while international companies are not easy to access, either lacking a local presence, or asking for higher prices to cover their high overhead costs. As our company grew, we understood that our approach is fit not only for small countries, but for bigger countries as well.

Taking advantage of our unique origin and experience, we chose a **Challenger approach** in the management consulting sector to bridge that gap. We decided to mix **smart people** with **lean processes and structures**, thus creating the leading company in Central and Eastern Europe.

Until today, we have exported our business model to Emerging Europe as well as to the Nordics, and we are present in 15 European countries. We have been developing our company based on the “one company” principle – so that even our smaller local offices are able to serve big projects in multiple areas.

## OUR MAIN TENETS FOR SUCCESS:



### We challenge our competitors

we deliver more value, at scale



### We challenge our clients

we are not afraid to ask the tough questions and help clients to challenge themselves or their own industries



### We challenge ourselves

we like unconventional projects





**CIVITTA PRIDES ITSELF  
IN BEING THE CHALLENGER  
ADVISORY,**

**DEALING WITH UNCONVENTIONAL  
PROJECTS AND OFFERING UNIQUE  
SOLUTIONS WHEN FACED WITH  
UNCERTAINTY. HOWEVER, THE  
UNIQUE SITUATION IN 2020,  
CAUSED BY THE COVID-19 VIRUS,  
TOOK EVERYONE BY SURPRISE,  
FORCING TO ADAPT.**



**WE WANTED TO DISCUSS WITH  
4 COMPANY LEADERS ABOUT  
HOW THEY DEALT WITH THIS  
UNCERTAINTY, HOW THEY SEIZED  
OPPORTUNITIES DURING THIS TIME,  
AND HOW WILL THIS PANDEMIC  
CHANGE THE CONSULTING INDUSTRY.**





### 1. First of all, please tell us what you do in CIVITTA and what is your area of expertise?

I am CEO & Associate Partner in CIVITTA's Slovak office. My 15 years in funding and finance in a range of international projects, EU related issues and support of SMEs serve me well in this role as I have advised founders of start-ups in legal, business and organisational structures to help align them with shareholder expectations. My experience as an investment advisor and work coaching founders on finance and investment strategies has been key as CIVITTA builds our brand and presence with start-ups and the regional ecosystem.

### 2. How did this unusual period impact your work in 2020? What unique situations did you have to deal with?

Working with companies and partners in a time of extreme ambiguity required quick decision making, often based on insufficient information, and tight timelines. Often, I had to consider a unique set of changing circumstances from multiple perspectives and make the call, present it in a way that my colleagues could buy into the decision and we could move forward together. Markets were changing, conditions were changing but we couldn't be paralyzed - we had to act. Now, we're used to everything being virtual but that was a profound change for working with clients,

and I think we built a strong foundation that positions us well.

### 3. What are the positive developments, if any, that happened because of this global situation?

No business was prepared to deal with a pandemic situation and neither were we. To me, the hardest part was not being able to see or interact with our team in person. We dealt with the uncertainty, without knowing what would happen tomorrow, the day after tomorrow or in a month. We are a young but strong team and "of course" we worried about our employees' safety too. For the business, we had concerns that if postponed projects initially might ultimately be canceled. But we united as a company, as a team and focused on using all of our resources and delivered quality and impactful projects. So as a team, we have come through it even stronger.

### 4. How do you think this pandemic will impact the consulting industry or the way we work in the near and medium-term future?

For one thing, it's proven that we can efficiently and effectively work remotely. And the benefit of that is at least two-fold: first, greater focus on the quality of our individual work product and second, that real teamwork can happen virtually. Working in the virtual world enabled us to reach out and connect with

global stakeholders or experts that we probably would not have engaged with. We leveraged that well and will continue to do so. In this way, the current situation became an opportunity, not a complication.

### 5. What's your biggest learning that you take from this year's experiences? It can be either professional or personal.

Professionally, I have become more digitally competent and that benefits our team, our clients and partners and me. Personally, I have become more confident about how my experience and passion for our work with founders and SMEs benefits the ecosystem in Slovakia and CEE and will have an impact.





# TUOMAS VIRTANEN

## **1. First of all, please tell us what you do in CIVITTA and what is your area of expertise?**

I am running our operations in Finland where we focus on solving growth-related challenges for Nordic clients with a broad service offering - whether it is about data-driven pricing, acquisition target analysis, new service line development or expansion to new markets.

## **2. How did this unusual period impact your work in 2020? What unique situations did you have to deal with?**

The uncertainty in the spring surely brought a lot of stress but we quickly oriented our minds towards how to make the best out of the challenging situation. In practice, this meant offering some new types of services such as recovery planning and funding to our clients. Obviously the traditional ways of work also got seriously disrupted but I was happy to see our team and clients adapt well to remote working conditions, and even deliver a couple of strategy assignments with no traditional "facetime"!

## **3. What are the positive developments, if any, that happened because of this global situation?**

I am very thankful to our clients, who showed great challenger spirit and rather than holding back their investments, actually saw this situation as a possibility to explore and capture new growth opportunities, and who will likely emerge from the crisis in a stronger position than their perhaps more conservative competitors. Furthermore, these economically challenging times brought obvious focus on the client end to their spending on external services, and enabled strengthening CIVITTA's positioning as the "better value for money" alternative than our competitors.

## **4. How do you think this pandemic will impact the consulting industry or the way we work in the near and medium-term future?**

I believe this more remote working environment will become the new normal and should facilitate development of new supporting tools to conduct consulting assignments. Secondly, I would predict companies will move with more urgency in digitizing their core processes, which should create more demand for consulting companies that can provide the full service offering: from strategic thinking to design and implementation of digital assets. Thirdly, the client focus on impact vs. costs

will likely continue with more scrutiny in the future.

## **5. What's your biggest learning that you take from this year's experiences? It can be either professional or personal.**

Keep calm and try to openly look at new opportunities - they always exist there, especially during challenging times.



# EGLĖ JUODSNUKYTĖ



## 1. First of all, please tell us what you do in CIVITTA and what is your area of expertise?

I am a Partner at CIVITTA Vilnius office and a member of the International private stream board, that is responsible for our private sector practice development and international coordination among partners. I have been with CIVITTA for over 10 years focusing on supporting our corporate clients in strategic planning, key transactions and transformations across the CEE region and beyond.

## 2. How did this unusual period impact your work in 2020? What unique situations did you have to deal with?

2020 was unique in many ways...

First, huge variations in our business outlook from 'should we prepare for the worst' in March to 'how can we expand the team quickly to fulfil projects' in September to 'this is fantastic and the best year we have ever had' towards the end of 2020. We are closing 2020 with much more confidence about our Challenger business model and future outlook.

Second, moving from spending almost half of my time on business trips in 2019 to very few business trips in 2020. Being at home provided more time to analyse my current roles and think about priorities going forward in both personal and professional life.

## 3. What are the positive developments, if any, that happened because of this global situation?

I see faster decision making, more focus and quicker implementation of the initiatives at our client organizations. While increased speed was fuelled by covid, I do believe it is crucial we retain it to make our businesses successful long-term.

Another trend - shift towards strategic growth initiatives vs efficiency in our region. Since covid started we have been heavily supporting our clients in planning and entering new markets, introducing new products and services, supporting M&A transactions, and expanding digital capabilities. In contrast, in previous years we had done substantially more work on productivity and efficiency, which today are often replaced by digitization and automation. I do believe that companies making investments into growth and business model redesign today will benefit the most long-term.

## 4. How do you think this pandemic will impact the consulting industry or the way we work in the near and medium-term future?

Clients, as well as ourselves, will continue working remotely more often than during the pre-covid times. Last year has proved that it is possible to successfully conduct strategic workshops,

make decisions and implement projects online. Remote delivery proved to be more efficient time and cost wise in the majority of projects. While I am looking forward to free travel and more live interactions with the clients, I do believe we will continue delivering a lot of work remotely.

Also, in line with the priorities of our clients, we are expanding our digital and data practices as well as developing sustainability and other new service lines.

## 5. What's your biggest learning that you take from this year's experiences? It can be either professional or personal.

Every crisis brings me more confidence about the future outlook and our ability to adapt. During the global financial crisis ten years ago, I joined the recently established CIVITTA and became a part of a growth story that I am very proud of. After finishing 2020 with a great business result, my confidence about the future is even stronger.

We proved that we can prioritize, make decisions and implemented solutions much faster than ever before, whether talking about large organizations or small ones. I hope we will retain this increased speed and agility in the future.



# PANCHE KRALEV



## **1. First of all, please tell us what you do in CIVITTA and what is your area of expertise?**

I am an Associate Partner and CEO of CIVITTA North Macedonia with strong experience in the area of telecommunications and digital transformation. I am also active in business development for CIVITTA in the wider Balkan geographic area.

## **2. How did this unusual period impact your work in 2020? What unique situations did you have to deal with?**

CIVITTA MK was only established in Q4 2019 and we won our first contract in January 2020 which meant that this was the year to promote our services to potential clients and position ourselves on the local market. With the start of the covid pandemic, North Macedonia suffered a significant economic downturn that was fuelled by insecurity and reluctance of many companies to embrace digital technologies as the new channel for doing business. For a region that traditionally relies on "face to face" meetings, the covid pandemic was a serious game changer that required a shift in working habits for which many were not prepared. Nevertheless, even though with CIVITTA MK we encountered an unprecedented change in

societal and economic conditions in a period of couple of months, we managed to end the year the way we started – with satisfied clients, new contracts and a full pipeline.

## **3. What are the positive developments, if any, that happened because of this global situation?**

The covid pandemic also provided some competitive advantage for a company such as CIVITTA that has offices and teams in most countries of CEE/SEE. We won one of our mandates at the peak of the pandemic as a result of the fact that we had an office in Romania and qualified staff that was able to quickly conduct the necessary local research for a regional telco group. The company that they had originally contracted for this task did not have the local know-how and capacity to deliver the work required.

## **4. How do you think this pandemic will impact the consulting industry or the way we work in the near and medium-term future?**

It goes without saying that digital online platforms for collaboration will drive our business in the future. Physical borders for project delivery will cease to exist but capacity, know-how and quick adaptability to client needs will continue to be key factors.

## **5. What's your biggest learning that you take from this year's experiences? It can be either professional or personal.**

I would not say it is the biggest learning but rather a confirmation of what is known to many of us – persistence, hard work and team spirit always pay off. We had a rollercoaster year but ended up with great news of having won our first significant EU financed innovation project so we are looking forward to an exciting 2021!

# WHY WORK WITH CIVITTA

## WE DELIVER MORE

With an effective management model, we ensure that the money paid for our work is invested in the project, not into overheads.



## WE ASK THE TOUGH QUESTIONS

We challenge our clients to overcome the challenge themselves.



## WE LIKE UNCONVENTIONAL PROJECTS

We have an entrepreneurial mindset allowing us to be flexible and work with niche or unusual projects.



## WE GET THE JOB DONE

We collect facts, analyze them and deliver fact-based results. We are practical and we aim for impact.



## WE HAVE ESTONIAN ROOTS WITH UNIQUE CENTRAL AND EASTERN EUROPE & NORDICS FOOTPRINT

We are stretching over 15 countries throughout Europe.







# ONE TEAM

## FIFTEEN COUNTRIES

**24**

OFFICES

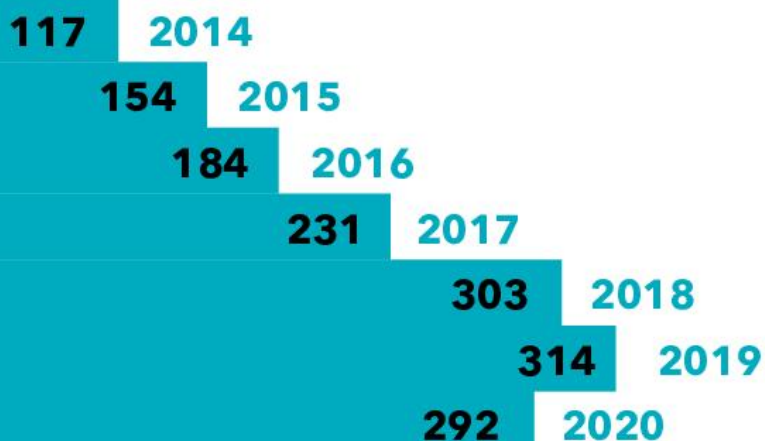
**15**

COUNTRIES

**292**

PEOPLE

### EMPLOYEES



UK  
London  
(sales office)

### TURNOVER (million EUR)



**20**  
million EUR  
TURNOVER



Finland  
Helsinki

Russia  
St. Petersburg

Estonia  
Tallinn

Estonia  
Tartu

Russia  
Moscow

Denmark  
Copenhagen

Latvia  
Riga

Lithuania  
Klaipeda

Lithuania  
Kaunas

Lithuania  
Vilnius

Russia  
Kaliningrad

Belarus  
Minsk

Poland  
Krakow

Ukraine  
Lviv

Ukraine  
Kyiv

Moldova  
Chisinau

Slovakia  
Bratislava

Romania  
Cluj-Napoca

Romania  
Slatina

Romania  
Bucharest

Serbia  
Belgrade

Bulgaria  
Sofia

North Macedonia  
Skopje





**CORPORATE**

**SOCIAL**

**RESPONSIBILITY**







# GRAND OPENING OF FAMILY HOMES

## FOR PEOPLE WITH SPECIAL NEEDS

In June 2020, two family houses for people with special needs were opened in Võru, Estonia – with a total of eight apartments. 43 people will move soon to new premises from Meegomäe.

This is a project that has lasted for almost four years, and during this time CIVITTA assisted the South-Estonian Special Care Services Center both in the preparation of the application and in the administrative project management.

As a result of the project, two separate family house-type one-off buildings were built in the city of Võru.

The project will provide the clients of the South-Estonian Special Care Services Center with high-quality places that provide round-the-clock special care services and community living services in accordance with the principles of customer-centredness and institutionalization.

The project was co-financed by the measure “Reorganization of Special Care Institutions”. The total cost of the project was 2.055.800 EUR and the grant was 943.789 EUR.



# CHASING UNICORNS

While Estonia's start-up community is already worldwide famous, this is the first time a movie approaches this topic – being based on more than 30 real-life stories of European start-ups.

Written and directed by Estonian filmmaker, technology entrepreneur and investor Rain Rannu, "Chasing Unicorns" is a semi-satirical narrative feature about a female founder trying to make it a male-dominated tech world, from Estonia to Silicon Valley.

After the success of the movie in cinemas, the movie team recorded 15 interviews with top Estonian tech founders and edited them together with the movie clips to teach and inspire future start-up founders.

These clips are used as a part of entrepreneurship and business classes in schools, and are **available for free online.**

The production of Unicorns School was financed through several rounds of investments – supported by CIVITTA Estonia and other Estonian entrepreneurs.

Launched in 2020, Unicorns School hopes to inspire more young people to pursue their business ideas.



# CIVITTA ACADEMY

CIVITTA works closely with different companies and knows what skills students and young professionals lack to meet the demands of businesses and to compete in the labor market, seeing the gap between business needs and students' knowledges. At the same time, CIVITTA has long been involved in the training of its employees, and in 2019 the team in Belarus decided to share their knowledge outside the company by organizing CIVITTA Academy, an educational project where business representatives teach students the skills needed in real business – an initiative unique in the country.

CIVITTA Academy helps talented students lacking practical skills by conducting appropriate training and giving practically oriented assignments; it helps students to find their first job by giving them the opportunity to undergo an internship in one of the leading Belarusian companies.

The project won "Partnership for Sustainability Award 2020" by UN Global Compact Network in Ukraine – an international project competition that awards 5 categories (People, Peace, Planet, Prosperity, COVID-19).

The first season of the project was held from September 2019 to May 2020. During this season, the following results were achieved:

- 300 students applied to participate in the project;
- 150 students completed the screening test;
- 45 students had been invited for an interview;
- 30 students participated in the first season of the project;
- Gender balance was an important issue kept in mind, as 57% of all participants were women;
- 27 trainings were held;
- 25 students received internships.

Moreover, CIVITTA was engaged in the selection of students for the second season of CIVITTA Academy, taking place in September 2020-April 2021. The trainings in the new season are divided into 5 intensive courses by 5 topics: hard skills, soft skills, marketing, finance, and business basics.

Additionally, case solving trainings are provided to students. In addition to trainings, students have a personal account with additional materials on the topics, as well as an interactive LMS (learning management system) application.







# COURSE

## STRATEGY

We work side-by-side with our clients on strategic planning, expansion to new markets, change management and organizational transformations to create meaningful changes in their business, organization and society. In our work, we offer the best strategy practices and experience gained across many countries and industries.

## INNOVATION

We help start-ups to grow and scale; universities to connect research with business and commercialize R&D; corporates to build and accelerate innovation inside the company, and governments to build innovation communities and ecosystems.

## FUNDING

We help clients identify funding opportunities, develop the project and follow through the implementation process. We provide advisory services in national EU program funding, EU-level program funding (Horizon 2020), equity investment attraction and private sector lending.



# SERVICES

## RESEARCH

We gather and analyze external and internal information in order to deliver valuable insights for decision-making of our clients. We perform market research, product market research, attitude market research, public policy research, evaluations of projects, public policies and programs, as well as impact assessments.

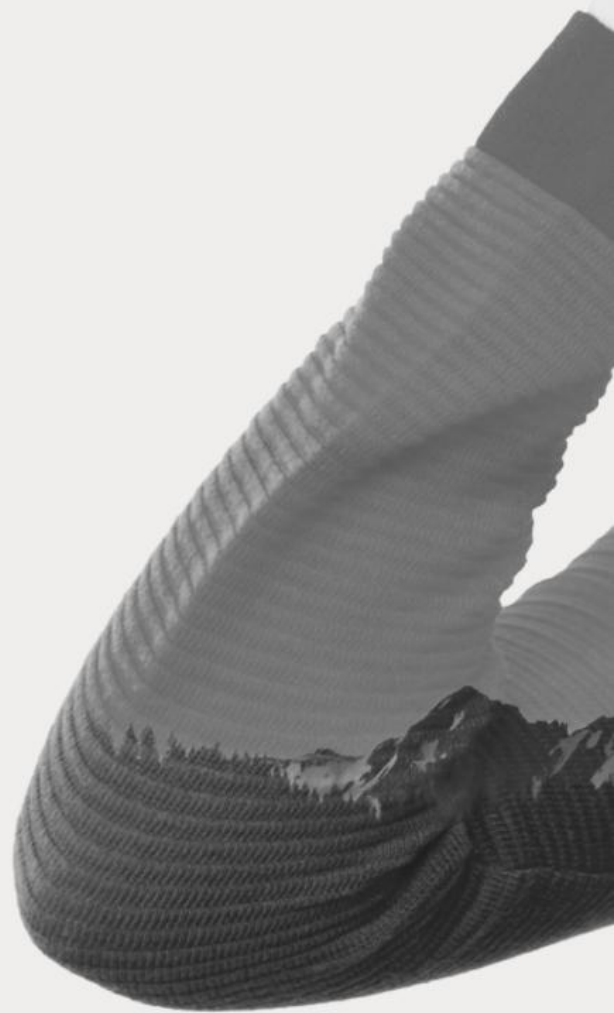
## DIGITAL

We help clients become more competitive in the digital era by using Big Data and the latest IT technologies. Our services include digital strategy, customer journey analysis and redesign, UI/UX, web and mobile development, customer base analysis and segmentation, churn analysis, and other IT and Big Data services.

## IMPLEMENTATION

We offer assistance at any stage of the project implementation, by setting up and running project management office (PMO), helping with business development/expansion and filling temporary capacity and competency gaps with on-hire consultants, as well as building outsourcing teams in Central Eastern Europe.

**OUR  
WORK**







# MARKET ACCESS STRATEGY

## FOR A FRENCH MEDICAL SERVICES PROVIDER

*Stream: Private*

*Industry: Medical services*

In late 2019, a French diagnostics provider approached us to **help them develop a Serbia market access strategy**. They had a long-standing presence in the country, and had engaged with senior government officials, but they continued to see limited sales volumes, and were struggling to penetrate the public market.

Over the first 2 months of 2020, **the CIVITTA team executed a detailed stakeholder mapping, spoke with well-placed contacts in government and the private sector, and conducted an in-depth analysis of public procurement data**. We discovered that the market access process had additional steps that the client had not accounted for, and that a previously under-recognized stakeholder in fact held the key to gaining favorable positioning in public markets. **We showed the client how their pricing compared to the market standard in their product category, and we gained insider insights that made it clear that the health system did not have the data**

**collection capabilities to support the analysis that would justify our client's higher prices**. Lastly, we identified a gap in the clients product approval status which was limiting their ability to compete for public tenders outside of a few select markets.

As a result of our analysis, **the client decided to re-focus their engagement efforts on the new key stakeholder we identified**, to secure an opportunity to demonstrate their product's benefits directly to senior-level decisionmakers.



# CUSTOMER LIFETIME VALUE

## FOR A TRANSPORTATION PLAYER

*Stream: Private*

*Industry: Transportation*

**A transportation services provider operating** in several European countries, providing mobility services for both personal and business customers, **faced increasing competition every year.** This resulted in high cost of acquisition for new customers, as well as an increased importance of preventing existing customers from switching to competitor services. Given this situation, **the client's goal was to understand the general trends of the existing customer base, as well as specific trends for certain segments.** Based on these findings, **we aimed to identify which customers are the most loyal and valuable for the business in the long term.**

**CIVITTA** formed an international team with experts from 3 different countries and **conducted an in-depth customer base audit using proprietary methodology based on the customer lifetime value (CLV) concept,** allowing to calculate CLV for each individual customer instead of just a segment or a cohort. This facilitated the

evaluation of even smaller customer segments, identifying the ones which are the most valuable to acquire.

Additionally, the CIVITTA methodology allowed to calculate CLV metrics such as alive probability, expected transactions, expected future value for each individual customer – and compare changes over time.

Seeing the initial audit results, the client decided that it is important not only to have a snapshot view on the customer base, but also to constantly track CLV dynamics, to monitor each individual customer and act based on the changes of the usage pattern. **For this purpose, the client implemented CIVITTA's customer lifetime value management tool "Elteevey" into their operational processes.**

# DEFINING STRATEGIC FOCUS AREAS

## FOR A NORDIC SUSTAINABLE MATERIAL PROVIDER

*Stream: Private*

*Industry: Sustainable materials*

### THE CONTEXT

The Client, a Nordic start-up, had reached good growth momentum in its first few years of inception, having also recently raised significant funding to become global leader in sustainable materials replacing plastic. They had few initial products already on the market, and had been facing a lot of interest from various industry applications.

**The client contacted CIVITTA for support in choosing and clarifying their strategic focus areas for R&D and commercial development activities.**

### THE SOLUTION

**CIVITTA took the challenge with a funnel approach - starting from a large universe of potential plastic product applications, and filtering out applications at several decision gates together with the Client.** Elements such as technical feasibility, regulation, drivers of bio-adoption, market sizing and unit economics evaluation were considered to narrow the list from over 600 alternatives to a top 20 list. Further application analysis for the top 20

alternatives was conducted, shedding light on the competitive environment and distribution channels, as well as identifying a tangible "hit list" of potential customers/partners.

### THE RESULT

Most promising applications were selected as focus areas to steer the Client's commercial and R&D operations, as well as determining key hypotheses that should be tested with tangible discussions with potential client contacts.

**A list of potential value propositions to target separate market segments was also developed.**

Furthermore, **CIVITTA provided a pricing tool for the Client** to assess opportunity economics and enable comparison against alternatives.





# CREATING A BUSINESS MODEL FOR A CHALLENGER IN THE DIGITAL GROCERY DELIVERY

*Stream: Private*

*Industry: Digital services*

Before 2020, in a number of industries the existing business models were good enough. The things radically changed this past year. **Having a digital business model became essential for any business.**

Our clients often entrust us with the assignment to develop digital business models right from the conceptual design phase, because they know that we will approach the matter with full dedication and challenge them and their ideas in every area, asking the tricky questions, discussing various scenarios, understanding the market and its size – that is the approach we usually have.

After all the assumptions are **set, we proceed with building the model accordingly, and continuously test assumptions until we are confident that the model represents a realistic picture.**

One of our clients approached us for help in developing their **business idea – a digital challenger for grocery deliveries** with a pilot in one of the largest cities in Western Europe. We started with setting up assumptions, understanding

the idea and the business model. We then discussed scalability options. After, **we did market research and had numerous discussions with experts to gain a full understanding of the market,** who are the competitors, what the customers want, what should be the best location to start, etc.

When all the assumptions were verified, **we helped in developing a high-level business plan including the financial model for the following three years,** with multiple different scenarios and investment needs for starting a business.

The project is currently in the fundraising phase and **we are looking forward to continue supporting our client** with the launch.



# ANALYSIS

## OF THE CONSTRUCTION SECTOR IN ESTONIA

*Stream: Public*

*Industry: Construction*

**The construction sector plays a key role in the socio-economic development of society:** companies generate wealth with construction activities that, combined with the real estate sector, account for approximately 17% of Estonia's GDP. In order for the further development of the construction sector to be consistent and competitive in Estonia, **CIVITTA Estonia has completed the analysis "A long-term view on construction" for the Ministry of Economic Affairs and Communications**, which creates a vision for the future and answers the question "What could the Estonian construction sector look like in 2035?".

In recent years, the Estonian construction sector has contributed significantly to general economic growth. However, **the analysis shows that several problems and challenges exist that in interaction reduce the international competitiveness of the construction sector**, such as lack of a long-term view on the living environment, a non-existent long-term and contra-cyclical construction

investments plan, smart commissioning principles and implementation thereof, as well as environmental sustainability and efficiency problems, a slowdown of export growth, a lack of openness to innovation, a low level of labor productivity and the bad reputation of the construction sector.

**In order to achieve the vision and resolve the problems detected, 7 large steps and 38 activities have been planned.**

By combining the activities of all objectives, it is possible to increase the contribution of the construction sector to Estonian GDP by 1.91 percentage points or approximately 496 million EUR in a year as added value. At the same time, the estimated total costs of the implementation of all these activities are 59.8 million EUR.



# DEALING WITH THE COVID CRISIS IN BELARUS

*Stream: Public  
Industry / Service: Research*

**During the first wave of COVID, Belarusians could observe the limited amount of information available in public and state sources about the influence of COVID on the economy, country and its people.** In this context, CIVITTA considered its obligation to provide objective information regarding the situation. Therefore, **we implemented a nation-wide survey to understand how Belarusians perceive the problem**, if they trust the state, if they feel an economic crisis, etc.

At the end of April 2020, the first results were published, and the effects were remarkable. The survey was published by all top Belarusian media, leading Russian and European news portals. Moreover, **state-owned analytical centers used CIVITTA's study in their reports.** In just a week, CIVITTA became a "voice of COVID in Belarus".

After that, we started to monitor the COVID situation every month. Overall, **we implemented more than 10 projects related to COVID** and its impact on the economic and social processes in Belarus:

the labor market, SMEs, poverty, sports, children, educational system, behavioral changes, etc.

These projects were implemented with the help of different donors, including local NGOs and international organizations such as UNICEF, UNFPA, UNHCR.

Furthermore, we studied in detail different official sources, explored international best-practices; developed mathematical models, sociological experiments, and special technologies of surveying to identify the consequences of the pandemic and potential solutions to overcome them.

Some of our clients said that **Belarus has developed and provided unique methodologies on how to get information and find solutions rapidly in a situation of uncertainty and limited data.**

Our Belarusian experience with COVID-related projects could be an example of how consulting companies can help the society get access to limited data, which in return may save many lives.



# LEADING THE CONSORTIUM THAT COMPILED THE STATE OF THE EUROPEAN TERRITORY (SOET) REPORT

*Stream: Public*

*Industry: Public Policy*

**The debate on the 2021-2027 EU Cohesion Policy is ongoing, with Member States, regions and cities preparing their programmatic and strategic documents.**

In this context, the European Spatial Planning Observation Network (ESPON)'s mission is to support policymakers at all territorial levels with data, tools, and publications, to facilitate evidence-based policy making. The State of the European Territory (SOET) report was a key publication in this respect, as it provides a synthesis of knowledge and evidence based on the ESPON studies and analysis developed during the 2004-2020 programming period. Moreover, the online interactive version of the report enables users to navigate the ESPON knowledge base and to create customized reports.

CIVITTA led the 5-partners consortium that compiled the SOET report through a participatory process that lasted almost a year, working closely with the ESPON team, and involving European experts, researchers, and other stakeholders. **The development of SOET included desk research**

**and synthesis, stakeholder workshops and focus-groups, GIS mapping, the development of the online interactive report and culminated with the final seminar,** where the content of the report was analysed within working groups.

While the final version of the report was launched in early 2020, so it does not include observations on recent events such as the Covid-19 pandemic or Brexit, **the evidence, case studies, data and policy recommendations presented provide valid and up to date information and inspiration for anyone interested in EU development policies and particularly those preparing the new programmes in the EU member states and regions,** as well as those advocating for functional and place-based approaches. SOET was also quoted by the Territorial Agenda 2030, the strategic policy document on territorial cohesion and spatial planning adopted in December 2020 by the EU ministers responsible for spatial planning, territorial development and/or territorial cohesion.





# ESTABLISHING A NEW START-UP ACCELERATOR BRAND

*Stream: Innovation*

*Industry: Start-up ecosystem*

CHALLENGER start-up accelerator was established as the leading non-equity CEE accelerator focused on early-stage tech start-ups. **The mission of the accelerator is to be the catalyst for the new economy in Central and Eastern Europe.** The first batch was organized in Bratislava focusing on start-ups in the field of sustainability and green tech.

**Challenger helps start-ups to find product-market fit, paying customers, and raise funding to scale operations.**

During the 4-month intensive education program, 12 CEE start-ups were connected with top industry experts and made progress during workshops and individual mentoring sessions with successful entrepreneurs and investors.

A few key numbers on the first batch:

- **60 applications** received;
- **12 start-ups** accelerated;
- Connected with **30+ investors**;
- **150+ hours** of mentoring and workshops;
- **40+ mentors.**

**The Challenger accelerator attracted support from various public and private partners**

such as Swiss Re, Microsoft, Slovak-American Foundation, Vienna Business Agency, Slovak Investment Holding, EIT Climate CIK, CB Investment Management, ZSE, the city of Bratislava, CISCO, and Google. It is also under the auspices of the Slovak President H.E. Zuzana Caputova.

**Challenger has been established as the umbrella start-up accelerator brand for CIVITTA** with new batches starting also in other countries and industry verticals.





# REDUCING DIGITAL SKILLS GAP IN THE EU

*Stream: Innovation  
Industry: Digital services*

## **Feeling like a 'digital native' is still luxury to many Europeans:**

according to the latest Digital Economy and Society Index report, in 2017, 43% of the EU population had insufficient digital skills and 35% did not have even the basic ones. To help the EU citizens to take a full part in the digital era, Digital Skills and Jobs Coalition (DSJC) has been established by the EC, unifying different initiatives around Europe.

One of them, the Pledge Viewer, is delivering a highly important function for the DSJC – a tool for making, viewing and managing 'pledges'. Pledges are real commitments made by organisations of all sizes working in any sector to go beyond the normal scope of activities and make a direct contribution to reducing the digital skills gap in the EU. They can do it by providing training and placements, facilitating access to digital skills development opportunities or driving awareness.

**CIVITTA Lithuania took over a mission to create a modern and user-friendly platform** where all the pledges could be

uploaded and viewed. **It required over 3000 hours of work and presented an opportunity to work shoulder to shoulder with the EC** and multiple organizations aiming to bridge the digital skills gap.

20 months of intense work on Pledge Viewer have passed. Over this time:

- **57 new pledges have been approved**, bringing the total number to 160. Think about names like Apple, Barclays, Hewlett-Packard, Google, Amazon...
- **In total, 13,5 million beneficiaries in Europe have been reached.**

**The tool has been praised as state-of-the-art in supporting policy implementation** and other Directorates-General are exploring opportunities to create their own versions.

# BUILDING AN ACCELERATION PROGRAM

## FOR ROCHE SLOVAKIA

*Stream: Innovation*

*Industry: Corporate innovation*

HealthCare Lab was born out of Roche's long-term commitment to bringing innovations that improve patients' lives to the market faster. In February 2020, **CIVITTA joined forces with Roche Slovakia to take the company's innovative mindset to a new level and transform its approach and attitude towards open innovation.**

Roche was determined to provide their unique know-how in healthcare, and simultaneously, wanted the start-up community to inspire Roche with new technological solutions that deserve more attention and support due to their significant impact on the healthcare system.

**CIVITTA Slovakia helped Roche design corporate-driven acceleration program and drove the implementation of the entire program,** taking on the mission to connect, grow, and nurture a community of innovators, researchers, healthcare providers, and regulators with Roche at its heart. HealthCare Lab targeted early-stage digital health ventures from Slovakia, Czechia, Poland, and Hungary. Eventually, the program's offering attracted applications from 10 European

countries! 6 companies made it through an all-day selection boot camp, after that undergoing an intensive, sprint-based, **4-months long acceleration program with an impressive network of experts** from the United States, Israel, the Nordics, Denmark, and other countries, developed by CIVITTA.

Thanks to the strong competence of Roche in the healthcare field and CIVITTA's extensive track record in delivering impactful corporate innovation and start-up programs, all start-ups graduated from the program with an exceptional experience. **Two companies raised their first seed investment during the program,** while all companies built valuable relationships with Roche's international network. In November 2020, the program's Final Demo Day attracted ~1500 online viewers, bringing together an impressive community of digital health enthusiasts. Roche's satisfaction and inspiration from the program resulted in a willingness to renew HealthCare Lab and scale it to multiple geographies in CEE.



# HORIZON 2020 FUNDING

## FOR A SMART WASTE MANAGEMENT TECHNOLOGY COMPANY

*Stream: Innovation  
Industry: Funding*

In 2020, **CIVITTA Slovakia helped** the Bratislava-based company Sensoneo **get the prestigious grant and equity funding from Horizon 2020 scheme EIC Accelerator.**

Sensoneo offers a smart enterprise-grade waste management technology for cities and waste management businesses to efficiently manage their waste while improving the environment and well-being of people. Sensoneo combines in-house developed, and EU manufactured ultrasonic Smart Sensors that monitor waste in real-time with sophisticated software. The impact of ineffective waste collection is a burden on the environment due to consequent CO2 emissions and on city budgets due to high costs for fuel, FTEs or vehicle wear.

**CIVITTA Slovakia helped Sensoneo attract €1.368 million in grant funding** and leverage an equity-based investment offer of €3 million. In this project, Sensoneo plans to tag all 110,000 bins in one EU capital and demonstrate its capability to provide full coverage and transparency,

enabling waste management companies to monitor the waste production of individual households. **Sensoneo would be the first market player in the world to unlock the pay-as-you-waste business model.** Sensoneo also wants to finalize a prototype of its sensor with radar technology that can detect contamination of different types of waste, particularly with a focus on biowaste. Sensoneo would be the first solution to enable such detection, helping reduce harmful methane emissions.

**Sensoneo became only the second-ever recipient of the competitive grant from Slovakia and first-ever Slovak company to be offered equity funding from EIC.** The success underlines CIVITTA's local and international expertise in attracting funding for innovative companies.

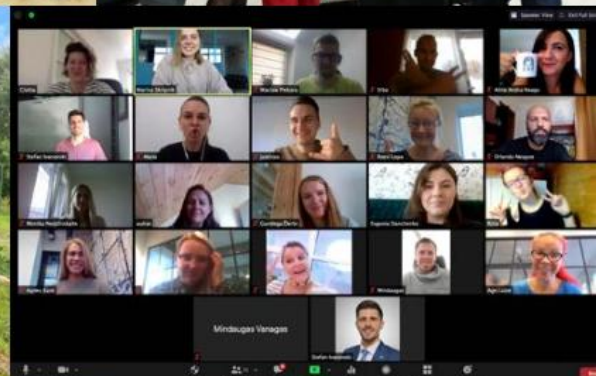


# 2020 IN PICTURES

**2020 WAS A YEAR LIKE NO OTHER. WHILE ALL INTERNATIONAL TRAVEL WAS SUSPENDED, WE MANAGED TO KEEP IN TOUCH ONLINE OR THROUGH LOCAL OUTDOOR TEAM EVENTS.**









## INTEGRITY



*Yauheni Krasnianski  
Belarusian office*

Integrity is doing the right thing for your client, colleague, society – no matter the implications. During the COVID crisis, coupled with the political crisis in Belarus, we considered it our obligation to provide the truth about the context with little transparency from the state. Our nation-wide survey results quickly became “the voice of Belarus”.

## GROWTH



*Zane Bērziņa  
Latvian office*

Growth. It does not come from a place of comfort, but if you start feeling comfortable with being uncomfortable, opportunities are endless. For me this principle is important not just in business, but also in my personal life. Whether it's picking up a valuable book, mastering chef skills, or even trying to get better at snowboarding.



# S VALUES

## ADVENTURE



*Tsvetomira Spasova*  
*Bulgarian office*

For me, my whole journey in CIVITTA in Bulgaria in 2020 was an adventure. Joining a brand new company at the beginning of the year and constantly trying to position it as a reliable new market player, changing offices, becoming a CEO, celebrating a birthday at a huge international company event in Kyiv, being bold enough to take a project for popularizing bats in this strange year and having the satisfaction of completing the year with almost 10 new projects you brought to the company are all part of my adventure in CIVITTA which, I am sure, has a lot more yet to present.

## IMPACT



*Kateryna Shapovalenko*  
*Ukrainian office*

There is influence and impact in consultants' work. Almost all projects are influential to some extent as they transiently make the client consider new ideas, but it may not go further. In CIVITTA, we do rather impactful projects nudging our clients to make the decision that meets their customers' needs. "Impact" is to see our clients' customers happy.

# CONTACTS

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