CIVIC MOVEMENT
“BUILDING TRUST”

Alternative Analytical Report on the Activities of the Tofan Government

The Economy and the Cost of Living
Commitments and Outcomes for Citizens

First 100 Days: 22 July – 30 October 2026

TRANSLATION FROM ROMANIAN

Translation note. The original figures, dates, evaluative judgments and reference numbering are retained. Source titles in the reference list remain in the original language. This translation does not independently verify the report’s claims.

Purpose of the report

This report compares the commitments in the Government Programme “European Economy, Efficient State”[1] and the investiture speech[2] with adopted measures, statistical data and publicly documented results. It examines the extent to which the Government fulfilled its commitments for its first 100 days and the early effects of its decisions on citizens, the economy and institutions. The analysis adopts a public-interest perspective.

The central finding is that visible administrative activity exceeds demonstrable results. Projects, consultations and procedures have been launched, but net savings and reductions in costs borne by the population have not yet been demonstrated. Meanwhile, inflation has accelerated and both the outstanding stock of government debt and interest expenditure have increased substantially.

Structure of the document

- Executive summary, overview table and methodology.
- Part I: The Economy and the Cost of Living (inflation, energy, public finances, economic activity, agri-food trade).
- Part II: The 13 Commitments: nine with deadlines falling within the first 100 days (six from the Programme and three added by the investiture speech), three multi-year commitments and one cross-cutting commitment.
- Conclusions, rating and requests for the Government's performance review.
- Annex: Inventory of Commitments.

Executive summary

What the Tofan Government leaves behind after 100 days. The record is that of a Government which has initiated various processes but delivered few results that citizens can feel or verify. Tax policy for 2027 and a deregulation resolution were adopted; an inventory of barriers, a functional audit of public administration and a new administrative-territorial map were initiated. At the same time, the sole commitment with its own specific calendar deadline—the Vulcănești–Chișinău power line—was not fulfilled on time; no final result has been demonstrated in curbing excessive inspections; an industrial project portfolio was presented; and the action plan needed for public monitoring of commitments is missing.

For families, the period brought higher prices, particularly for gas, a slowing economy and winter protection whose effectiveness has yet to be demonstrated. For the budget, it brought rising debt and interest costs and a tax policy that shifts the burden onto consumption. The Movement recognises that some of these trends were inherited or driven by external factors. Managing risks and protecting vulnerable groups nevertheless remain the Government's responsibility, and evidence on both counts was insufficient as of 30 October. The figures below support that assessment.

During the 100 days since the Tofan Government took office on 22 July 2026, pressure on household budgets intensified. Annual inflation rose from 6.51% in June to 8.60% in September[3]. The overall price level increased by 1.74% between those months, meaning that an unchanged nominal income purchases approximately 1.71% fewer goods and services. Gas price increases were a major contributor to September's month-on-month surge: the household tariff rose by 40.8% from 1 September and a further 28.8% from 1 October.

Public finances are also under pressure. The national public budget deficit for January–August was MDL 7.67 billion, MDL 2.04 billion above the corresponding period in 2025[4]. Government debt rose from MDL 142.79 billion on 30 June to MDL 150.36 billion on 30 September[5]. However, almost all the deterioration in the deficit relative to 2025 occurred before the Government took office: by 30 June the cumulative deficit was already approximately MDL 7.8 billion and did not deepen during July–August. Growth in debt and interest costs, by contrast, continued during the Government's term; the distinction is examined in Part I.

Cross-cutting finding: the Government Action Plan

Finding. There is no concrete Government Action Plan derived from the Government Programme. The Programme, the investiture speech and the 100-day list are political documents. An action plan is the instrument that translates objectives into activities with responsible institutions, deadlines, indicators and funding. Without it, deadlines, responsible parties and indicators cannot be verified for each commitment, leaving public evaluation at the level of declarations. Its absence has not halted activity—acts and sectoral plans have been adopted—but citizens cannot distinguish declared priorities from isolated measures.

Legal basis. Article 34 of Law No. 136/2017 on the Government requires the Government's action plan to be approved, implemented and published. Point 25 of the Government Regulation, approved by Government Decision No. 610/2018[6], provides that when a new Government is invested, proposals for the National Regulatory Plan must be submitted to the State Chancellery within one month after the vote of confidence. The Movement considers that the Government should have publicly presented a concrete timetable for fulfilling its commitments, with responsible parties, deadlines and verifiable indicators, within its first 30 days. This is the standard of transparency and accountability advocated by the Movement, distinct from the procedural deadline set by the Regulation.

Cross-cutting finding (Movement's assessment): unpublished plan. No approved or published Government Action Plan could be identified. We request publication of a plan specifying each action, responsible institution, deadline, indicator, source of funding and reference to the relevant Programme page. If it has been approved, its approval date and publication link should be provided.

Further findings. (1) According to Expert-Grup's Economic Thermometer, the economy entered stagnation in August, with GDP growth close to zero in the third quarter and no higher than 1% in 2026[7]; the NBM raised its base rate to 9.00%[8]. (2) Government debt reached MDL 150.36 billion as of 30 September[9], while annualised interest expenditure based on January–August is approaching MDL 6 billion. (3) The 2027 tax measures (a 20% increase in diesel excise duties and the standard VAT rate on monthly gas consumption above 150 m³ from April 2027) will be imposed on an economy in stagnation.

Of the six commitments with explicit deadlines in the Programme—five within 100 days and the Vulcănești line by 31 August—one was fulfilled on time (2027 tax policy, adopted by Parliament on 22 October[10], although the draft had been inherited from the preceding Government at an advanced stage); one was not fulfilled on time (the Vulcănești–Chișinău line); three were partially fulfilled (the barrier inventory was launched but a traceable public register is missing; a deregulation Government Decision was adopted on 28 October[11] but the associated bill was not; and an industrial project portfolio was presented on 29 October); and one lacks a demonstrable final result (excessive inspections). The investiture speech adds three 100-day activities: starting a functional audit and an inventory of public property, both documented as commenced, and putting into operation a central mechanism to monitor European commitments, for which public evidence is lacking[12].

Conclusion on commitments with no final outcome within 100 days

For commitments with no demonstrated final outcome (inspections and the monitoring mechanism) or only partial outcomes (the industrial portfolio, publicly presented without an action plan or implementation deadlines), the reported work stops at the process stage: a consultation, a draft legal act, a plan or a public presentation. As of 30 October, none of these commitments has yielded a final act in force, a measured indicator or a verifiable benefit for businesses or citizens. Some activities continue exercises begun by the previous Government (mapping regulations, tax policy and delineating public assets), so the new cabinet's own contribution is smaller than the volume of visible activity. The ratings reflect the situation on 30 October.

Summary table of commitments

The ratings use the scale defined below. “Origin” indicates whether a commitment or its preparatory work was inherited from the preceding Government.

No. 1. Limiting excessive inspections and introducing risk-based oversight. Deadline: 100 days. Origin: mixed. Rating: not demonstrated. Main evidence: complaints and barriers identified; no measurement of inspections eliminated.

No. 2. Tax policy for 2027. Deadline: 100 days. Origin: inherited (advanced stage). Rating: completed. Main evidence: adopted by Parliament on 22 October; procedural completion[13].

No. 3. Launching the inventory of barriers. Deadline: 100 days. Origin: continuation. Rating: partial. Main evidence: launched[14]; traceable public register missing.

No. 4. Removing excessive regulations. Deadline: 100 days. Origin: continuation. Rating: partial. Main evidence: Government Decision No. 587 (NU 684) adopted on 28 October[15]; bill NU 683 not adopted.

No. 5. Industrial and logistics project portfolio. Deadline: 100 days. Origin: new. Rating: partial. Main evidence: portfolio of 19 projects presented on 29 October[16]; no implementation timetable.

No. 6. Vulcănești–Chișinău power line. Deadline: 31 August 2026. Origin: inherited (earlier delay). Rating: not completed. Main evidence: commercial operation not begun; acceptance process started on 27 October[17]; sixth postponement.

Summary table of commitments (continued)

No. 7. Energy protection. Deadline: multi-year. Origin: mixed. Rating: ongoing. Main evidence: compensation registration from 2 November[18]; 7.9% of Casa Verde applications completed[19].

No. 8. Functional audit and administrative efficiency. Deadline: initiation within 100 days; remainder multi-year. Origin: new. Rating: ongoing. Main evidence: initiation documented; methodology adopted on 21 October[20]; savings not demonstrated.

No. 9. Local government reform. Deadline: multi-year. Origin: mixed. Rating: ongoing. Main evidence: proposed map presented on 8 October[21]; social outcomes unproven.

No. 10. Predictable agricultural support. Deadline: multi-year. Origin: mixed. Rating: partial. Main evidence: no public payment timetable; 2025 complementary applications paid 12–20 months after submission; about 78% of payments in August–October were compensatory[22].

No. 11. Public property and privatisation. Deadline: inventory initiation within 100 days; remainder multi-year. Origin: inherited (project dating to 2019). Rating: ongoing. Main evidence: asset delineation advanced[23]; privatisation tenders yielded no transactions[24].

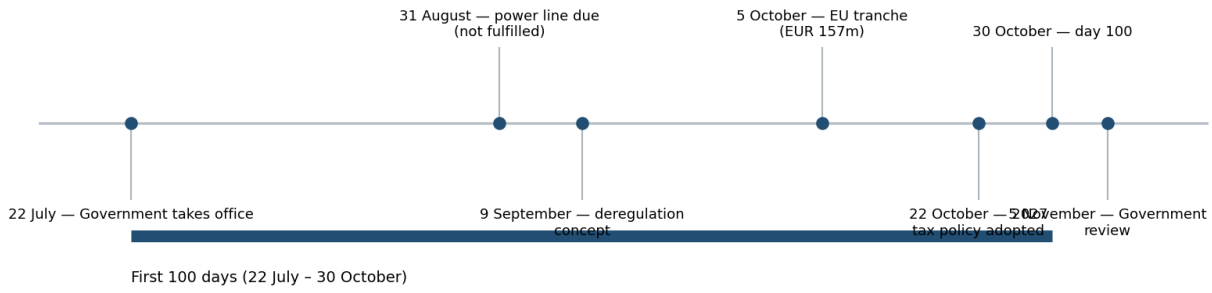
No. 12. Evaluation of ministers' performance. Deadline: cross-cutting. Origin: new. Rating: not demonstrated. Main evidence: no public individual performance scorecards identified.

No. 13. Central mechanism for monitoring European commitments. Deadline: 100 days (investiture speech). Origin: new. Rating: not demonstrated. Main evidence: no public announcement of operational launch.

Rating legend Completed — the promised deliverable exists and was documented by the deadline. Partial — progress is documented, but the promised deliverable is unfinished or a final outcome is missing. Ongoing — the process remains open and the deadline has not passed, or no deadline was set. Not demonstrated — the public evidence reviewed is insufficient to confirm delivery; this does not automatically mean no result exists. Not completed — an explicit deadline passed without the promised deliverable.

Timeline of deadlines and events

Figure 1. Timeline of the first 100 days and relevant deadlines. Source: documents cited in the text; authors' visualisation.



Methodology and limitations

The analysis draws on the Programme[25], official acts and draft acts, National Bureau of Statistics (NBS) data, Ministry of Finance reports, sectoral authority data and European Commission documents. Positions of the Movement are identified as such. They do not replace official statistics and do not constitute an independent audit.

Classification of commitments. The 13 selected commitments are grouped by source and deadline: (a) five obligations framed as “the first 100 days” in the Programme (Nos. 1–5, p. 12); (b) one with a separate calendar deadline of 31 August 2026 (No. 6, Vulcănești–Chișinău power line, §4.10.2, p. 91); (c) three activities added to the 100-day list by the investiture speech: beginning the functional audit (No. 8), beginning the inventory of public property (No. 11) and operating the central mechanism to track European commitments (No. 13); for Nos. 8 and 11, only initiation was promised within 100 days and the remaining work is multi-year; (d) three multi-year commitments selected for social impact, financial importance and verifiability (Nos. 7, 9 and 10), assessed only for decisions taken during this period; and (e) one cross-cutting commitment from the speech (No. 12). Energy efficiency is included in No. 7.

Actions, not outcomes. The Programme and speech frame most 100-day obligations as actions (“launch”, “present”, “begin”, “approve”). Consequently, the report distinguishes formal completion of the promised action from the actual outcome for citizens, and a positive rating applies to the former.

The Movement's more demanding standards (for example, a public traceable register) are expressly identified as evaluation criteria.

Separating commitments Nos. 1, 3 and 4. No. 1 measures inspection practices, namely how much the burden of inspection has actually fallen. No. 3 measures the launch of the barrier inventory (the Programme commitment) and, separately, its quality (the Movement's standard: public and traceable). No. 4 measures the legislative result: acts that remove regulations or requirements. The same fact (such as the number of barriers identified) may appear in several places but counts toward only one rating: that of the commitment to which it directly relates.

Baseline and attribution. For monthly series, June 2026 is the last full month preceding the investiture. Budget execution is compared across identical periods of 2025 and 2026. Data covering pre-term periods (second-quarter wages, first-half GDP, January–August deficits and interest payments) are presented as a baseline and are not attributed to the Tofan Government.

Interpretation of ratings. An adopted act can fulfil a procedural obligation without demonstrating social impact. Ratings may be revised should the Government produce additional documentation.

Part I. The Economy and the Cost of Living

How to read this part. These data show the context and the effects on citizens 100 days after the Government took office. The Government's responsibility is assessed in terms of risk management and protection of vulnerable groups rather than the level of prices alone.

1. Inflation and purchasing power Indicator	**June 2026**	**September 2026 Year-on-year inflation**	**6.51%**	**8.60% Price increase since December 2025**	**4.80%**	**6.62% Source: NBS[26].**

Prices rose by 1.66% in September compared with August: a 40.8% monthly increase in gas prices added approximately 1.1 percentage points. Year-on-year, services cost 12.56% more, non-food goods 8.97% more and food 5.12% more[27]. The pressure extends beyond the food basket. For low-income families, a higher energy bill leaves less money for food, medicines and transport.

The average gross wage in the second quarter was MDL 16,895.7, up 9.2% in nominal terms and 2.3% in real terms on the previous year[28]. Yet the average masks a difference: nominal growth of 5.1% in the budget-funded sector was below inflation (approximately −1.5% in real terms), whereas in the non-budget sector it was 10.2% (approximately +3.3% real). The sector-specific estimates are the authors' calculations using average inflation of 6.7%. These were conditions inherited by the new cabinet, not its achievement, but they remain vulnerabilities demanding a response in wage and social-protection policy.

2. Energy and the burden of bills

On 28 September the National Agency for Energy Regulation (ANRE) approved a household gas price of MDL 26.14/m³ including VAT (MDL 24,202 per 1,000 m³ excluding VAT), effective from 1 October[29]. The decision cites higher procurement costs (from MDL 12,150 to 17,050 per 1,000 m³, about +40.3%), European prices and the state of emergency declared in the energy sector on 26 September.

Tariff chronology. Household gas cost MDL 14.42/m³ until 1 September, MDL 20.30/m³ from 1 September and MDL 26.14/m³ from 1 October, a cumulative increase of 81.3% over two months (authors' calculation).

The first increase already appears in September's consumer price index[30]; the second will appear in the October index, due to be published in November.

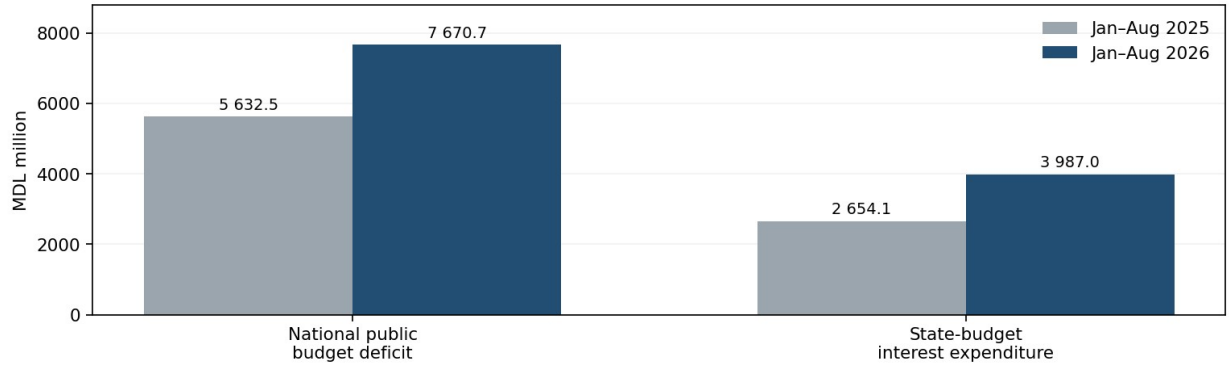
Winter preparations. On 9 September the Government approved its 2026–2027 heating-season plan: emergency stocks, infrastructure inspections and alternative fuels, with October–November deadlines, reporting from 15 October and a commission tasked with checking preparedness[31]. Registration for household compensation begins on 2 November[32]. MDL 550 million is allocated for 2026, an amount the Prime Minister himself described as insufficient[33]. By comparison, the preceding winter's compensation cost approximately MDL 2.4 billion, while compensating all households would cost about MDL 3.8 billion, according to the Prime Minister. Missing are public data on actual fuel stocks, deliveries to households and the completion of plan milestones. The Vulcănești–Chișinău power line, which would improve security of supply, is not in commercial operation (Commitment 6).

Supported conclusion: household gas costs increased by approximately 81% during the Government's term, while the effectiveness of compensation measures remains unproven. This does not attribute the entire price increase to the Government; responsibility is judged by risk management, decisions within its control and protection provided to the population. Compensation and energy renovations are examined under Commitment 7.

3. National public budget and government debt

Deficit. In January–August the national public budget deficit was MDL 7.67 billion, MDL 2.04 billion (+36.2%) more than in 2025; spending rose by 7.4% and revenue by 5.4%[34]. Six of those eight months preceded the new term: at the end of June the cumulative deficit was already approximately MDL 7.8 billion[35], so it did not widen in July–August. Deterioration relative to 2025 took place mainly before the current Government assumed office. This does not, however, prove structural improvement: the timing of receipts and investment expenditure can change the balance without a lasting policy change.

Figure 2. National public budget deficit and state-budget interest expenditure, January–August 2025 and 2026 (MDL million). Source: Ministry of Finance[36].



Government debt rose from MDL 142.79 billion on 30 June to MDL 150.36 billion on 30 September (+7.57 billion, +5.3%), MDL 2.63 billion above 31 August and MDL 17.58 billion above year-end 2025[37]. The change in outstanding debt is not equal to gross new borrowing because repayments and exchange-rate variations matter. On 30 September, 63.0% of debt was classified as variable-rate debt (risk ceiling: 60%) and 95.9% of domestic securities matured within one year (ceiling: 90%)[38]. Under the Ministry of Finance's methodology, the variable-rate category also includes fixed-rate domestic debt maturing within one year. These indicators reveal sensitivity to interest rates and refinancing rather than a solvency crisis.

Interest costs. The state budget paid MDL 3.99 billion in interest during January–August, up 50.2% on 2025, equivalent to approximately MDL 6.0 billion annualised[39]. The Movement estimates that servicing government debt costs more than MDL 6.5 billion a year—over half a billion per month and roughly 2.8 times the 2026 agricultural subsidy fund of MDL 2.29 billion[40] (authors' calculation). Money spent on interest cannot be used for salaries, roads or agricultural support; this is a budgetary trade-off, not a direct accounting equivalence. Some costs are inherited (interest-rate levels and debt structure). The Government is responsible for the pace and composition of new borrowing and how the deficit is financed. We request a plan to reduce the rate of borrowing and the stock of government debt.

4. Economic activity and the productive base

In the first half of the year, real GDP grew by only 0.6%, gross fixed capital formation fell by 1.4% and household consumption rose by 1.5%[41]. August industrial production was 0.7% below August 2025[42] and merchandise exports fell by 6.1% in August, even though they rose by 9.3% over January–August as a whole[43]. These figures describe an economy inherited with weak growth and investment. Expert-Grup's Economic Thermometer further suggests that the economy shifted from growth to stagnation in August: GDP growth close to zero in the third quarter and no more than 1% for 2026, against potential growth of around 3%. Consumption remains the only driver[44]. On 17 September the NBM raised its base rate to 9.00%.

This makes borrowing more expensive[45]. The indicator is an analytical tool, not an official statistic; in the first half of the year it overestimated growth.

5. Trade balance (January–August 2026 compared with January–August 2025) Indicator — all merchandise trade	**January–August 2026, EUR million Exports**	**2,239.4 Imports, calculated from reported values**	**6,660.9 Trade balance: exports minus imports**	**−4,421.5 Source: NBS[46]. Total exports in January–August 2026: EUR 2,239.4 million (+9.3%).**

The total merchandise trade deficit for January–August was EUR 4,421.5 million, 6.0% larger than in 2025. In August exports fell by 6.1% and the deficit grew by 14.9% (EUR 549.0 million).

6. Current macroeconomic position: interim conclusion

Overall picture. On day 100 the macroeconomic situation was marked by accelerating inflation (8.60% in September), a loss of purchasing power in the budget-funded sector, modest first-half economic growth (0.6%) and signs of stagnation in the third quarter[47], falling investment, a widening trade deficit and increasing outstanding debt and interest costs, with considerable exposure to variable interest rates and short-term refinancing.

Inherited conditions and present responsibilities. The Movement acknowledges that several trends predate the Government's term: weak growth, external imbalances, the debt structure and prevailing interest rates. This does not remove the Government's responsibility for risk management (transparency in gas procurement, the compensation timetable, cold-season preparations and debt-financing structure) and tangible outcomes for citizens, especially vulnerable groups: pensioners, public-sector employees, rural households heated with gas and farmers relying on support. As of 30 October, the promised protection had not yet been demonstrated by actual payments, net bills or measured savings.

Part II. Commitments and Outcomes for Society

The Programme sets out a single list of obligations for the first 100 days (p. 12): “The first 100 days must restore economic confidence by limiting excessive inspections, adopting the 2027 tax policy, launching an inventory of administrative barriers and amending the legal framework to reduce the burden on entrepreneurs, and approving the portfolio of priority industrial and logistics projects.”[48]

The investiture speech repeats and expands this list. The same paragraph opens with the caution, “We will not solve all of the country's problems in the first one hundred days,” before listing the following commitments: “We will present the tax policy for 2027.” “We will continue the inventory of administrative barriers and review of authorisation requirements.” “We will limit non-essential inspections and move towards risk-based oversight.” “We

will begin a functional audit of public administration and the inventory of public property.” “We will approve the portfolio of priority industrial, logistics and infrastructure projects.”[49]

For each commitment, the report distinguishes completion of the obligation from evidence of impact. Verdicts use the rating scale in the legend.

1. Limiting excessive inspections

Commitment. Programme, p. 12: “limiting excessive inspections”; §4.1.1, p. 21: “risk-based state inspections, coordinated among institutions and oriented towards prevention and voluntary compliance”[50]. The speech states: “We will limit non-essential inspections and move towards risk-based oversight.”[51] The test has two components: actually reducing excessive inspections and adopting risk-based oversight while preserving safeguards for consumers, employees and the environment.

The sole source of figures on complaints is the Government communication of 9 September: more than 200 submissions were received between 22 July and 6 September. Of these, 63 concerned regulatory barriers, bureaucratic procedures or sector-specific fees, and 38 concerned state inspections; approximately 74% of inspection-related complaints concerned the State Tax Service and the National Food Safety Agency (ANSA)[52]. These numbers do not appear in the explanatory note to the draft Government Decision[53] or on the bill's webpage[54], and no underlying official report or act could be identified. The complaints point to real problems, but they do not constitute a statistical sample of businesses or measure the incidence of abuses in the economy.

Public consultations on the package confirm legislative preparatory activity, but do not show how many unjustified inspections were eliminated, how many decisions reversed or how much time businesses saved. Every simplification should be linked to the risk it concerns: removing duplicate inspections is beneficial, but weakening sanitary or workplace-safety inspections can shift costs onto citizens.

The second component, risk-based oversight, requires published risk criteria and a legal act putting them into effect. No such act was identified in the sources reviewed.

Verdict: Not demonstrated. The actual reduction in excessive inspections is not established by the available sources. We request before-and-after comparisons (number and duration of inspections and appeal outcomes) published by the Government, the Ministry of Economic Development and Digitalisation (MDED), and inspection bodies; the original official report or act behind the 200 complaints and their categorisation (63 barriers and 38 inspections); and the number of barriers confirmed after examination.

2. Adoption of tax policy for 2027

Commitment. Programme, p. 12: “adoption of tax policy for 2027”; §4.6.2, pp. 59–60[55].

The Government approved the bill on 8 September[56], Parliament passed it at first reading on 10 September[57] and adopted it on 22 October 2026[58]. The requirement to adopt it within 100 days was fulfilled. Adoption must nevertheless be distinguished from economic effects. The draft was inherited from the previous Government at an advanced stage, so the Tofan Government cannot claim sole credit for its preparation.

The Government's revenue estimate at approval was approximately MDL 5.1 billion in additional receipts, including roughly MDL 4.3 billion from VAT and excise duties (about 84%)[59]. These figures reveal the underlying purpose: the package is not tax policy in the fuller sense of a vision for the economy, investment or fairness, but a way of collecting additional revenue for an austerity budget. The burden falls on consumption, and households spending nearly all their income bear a proportionally greater cost.

Measures taking effect in 2027. Reports of the final vote of 22 October indicate a 20% increase in excise duty on diesel (10% on most other excisable products, including petrol). From 1 April 2027, the reduced 8% VAT rate on natural gas will apply only to monthly consumption up to 150 m³; consumption above that threshold will attract the standard 20% rate. A comparable protected threshold applies to electricity, above which the standard VAT rate is levied. Of the MDL 5.1 billion in estimated additional revenue, approximately MDL 2.7 billion is expected from excise duties and MDL 1.6 billion from VAT. Diesel is a basic input for transport and agriculture, so higher costs pass through into goods prices. Households using more than the threshold, especially those heating with gas, will pay the standard rate amid economic stagnation and high inflation.

The Government has not published the combined impact on businesses and households.

The Movement's consistent position. The Movement has repeatedly called for lower VAT on gas during the crisis and amid exceptionally high prices, and for the 20% rate not to apply to gas and electricity from the beginning of the year, since a VAT increase would directly raise bills. Those requests stand as long as prices remain so high. Starting from a much harsher proposal and subsequently softening it does not alter the package's purpose and cannot be presented as a concession to citizens: a less severe burden remains an additional burden at a time when families are already losing purchasing power.

The state must begin with itself. Before asking more of citizens and businesses, the Government owes the public demonstrable savings in its own apparatus: lower administrative expenditure, genuine elimination of duplicate functions, control of interest costs and costs of new structures (Part I, section 3, and Commitment 8). Until then, seeking additional consumption-based revenue remains a choice to place the cost of reform on vulnerable people.

Verdict: Completed (on time). Adoption took place within the first 100 days; this rating concerns only fulfilment of the adoption requirement and does not establish any benefit to citizens. The Movement maintains its calls to reassess and phase in fuel-excise increases, including moderating or postponing them during external shocks; review the VAT amendments for natural gas and electricity; recalibrate the protected consumption thresholds; and transparently assess effects on households and the economy.

We request that the 20% rate not be applied to gas or electricity from the start of the year and that VAT on gas be reduced while prices remain elevated. The Ministry of Finance should publish the final package's impact across income groups, sectors and local budgets, proposed savings in the state apparatus and reasoned responses to accepted and rejected proposals.

3. Launching the inventory of administrative barriers

Commitment. Programme, p. 12: “launching the inventory of administrative barriers”[60]. The Programme requires an inventory to be initiated but does not specify that it must be public or verifiable. These are the Movement's quality standards. We assess launch (the stated obligation) separately from the quality of the instrument (the Movement's standard).

The launch is documented: the Government collected complaints from 22 July, and on 9 September reported over 200 submissions and 63 identified barriers, including 38 related to inspections[61]. However, the only evidence is the press release: no official act, order or report containing the inventory or documenting its launch could be identified, and the draft decision's explanatory note does not reproduce these figures[62].

On that basis, the obligation to “launch” is deemed formally fulfilled, while the investiture speech describes it as continuation of an existing exercise rather than a new initiative.

The published outcome consists of aggregated figures, not an inventory allowing each barrier to be tracked: the underlying provision, responsible institution, remedy, deadline and resolution status are not publicly accessible. Without those elements the public cannot verify the inventory, reducing its usefulness for Commitments 1 and 4. A voluntary reporting mechanism may favour firms with the resources to lodge complaints, while smaller firms and businesses in remote localities may be underrepresented.

Verdict: Partial. The exercise was launched and the Programme's formal obligation met. The instrument's quality—a public and traceable inventory—has not been demonstrated; this is the Movement's requirement, not an obligation expressly quoted from the Programme. We request that MDED publish a register with a unique identifier for each barrier, the applicable provision, responsible body, remedy, deadline and reasons for acceptance or rejection.

4. Removing excessive regulation and streamlining authorisations

Commitment. Programme, p. 12: “amending the legal framework to reduce the burden on entrepreneurs”; §4.1.1, pp. 20–21: “replacing unjustified licences with notifications or self-declarations”[63]. Speech: “An authorisation that does not protect a clear public interest must be removed or replaced with notification.”[64] The relevant test is whether acts removing regulatory requirements exist and have been adopted, not announcements about them.

Deregulation instruments. MDED prepared two drafts: (1) a bill removing excessive regulations in the private sector (NU 683/MDED/2026), subject to renewed public consultation from 7 to 21 September 2026[65]; (2) a draft Government Decision amending and repealing decisions (NU 684/MDED/2026), whose explanatory note proposes 20 measures affecting road transport, public health, the environment, occupational safety, agricultural subsidies and

pharmacies[66]. Together, the packages cover 71 laws and 29 Government Decisions, around 80 authorisation instruments and approximately 180 requirements described as hidden authorisations[67].

Stages and status as of 30 October

- Mapping existing regulations: completed (launched under the previous Government); file 158736[68].
- Deregulation concept: completed (9 September); Government communication[69].
- Draft acts NU 683 and NU 684: prepared (consultations since 17 August); MDED[70].
- Government approval of draft decision NU 684: completed (28 October, Government Decision No. 587); Government[71].
- Government approval of bill NU 683: not completed; Particip.gov.md[72].
- Adoption of the bill by Parliament: not completed.

Note: status on 30 October. The Government's 28 October release discusses measures concerning waste, classification certificates for rural guesthouse subsidies, transport operators and pharmacies; Government Decision No. 587 appears in the list of adopted acts.

Degree of completion. The decision proceeded through all stages to adoption; the bill had only reached consultation. Thus, there is a partial legislative outcome, while announced savings are estimates rather than savings already realised: the Government projects annual savings of MDL 36.6 million solely from the measure concerning vehicle registration plates for transport operators[73]. Actual benefits for businesses therefore remain to be demonstrated.

Link to the Reform Agenda. In the first 100 days the confirmed legal outcome was the adoption of the Government Decision removing certain excessive requirements. The legislative component remains unfinished: the related law had not been adopted by the assessment date. Only part of the proposed changes is documented, while any actual reduction in administrative burdens on businesses must still be demonstrated. By the end of 2026, the relevant Reform Agenda conditionality requires at least two regulatory packages covering a minimum of 30 deregulation measures, the abolition of at least 20 additional authorisation documents and the removal or justified incorporation into the legal framework of “hidden” authorisations. The Government must show concretely how adopted measures fulfil these requirements and complete outstanding actions. Results from the 2025 phase were inherited and cannot count as achievements of the first 100 days.

Verdict: Partial. The Government Decision (NU 684, Decision No. 587) was adopted on 28 October, producing a legislative outcome. Bill NU 683 has not been adopted. Announced savings are projections. The package continues an exercise started by the previous Government. We request the publication and entry-into-force dates of Decision No. 587; a public mapping of each removed requirement to the final act, effective date and beneficiaries; and a timetable for the bill.

5. Portfolio of industrial and logistics projects

Commitment. Programme, p. 12: “approval of the portfolio of priority industrial and logistics projects”[74]. The speech adds infrastructure: “We will approve the portfolio of priority industrial, logistics and infrastructure projects.”[75] The test is an identifiable portfolio showing projects, selection criteria, funding and responsibilities.

On 29 October the Government publicly presented a portfolio of 19 strategic investment projects under the “Building Moldova” initiative. The official communication identifies projects and, for some, financiers, budgets and implementation deadlines. This achievement should be recognised in the first-100-days assessment. However, the documents reviewed do not clarify whether the portfolio fully corresponds to the promised industrial, logistics and infrastructure portfolio or through which decision it was approved.

Verdict: Partial. Public presentation of an investment portfolio is documented. Its approval and full coverage of the promised portfolio have not yet been established by the documents examined.

We request that the Government and MDED provide the act approving the portfolio, demonstrate how it matches the Programme commitment and disclose project selection, financing and implementation responsibilities.

6. Commissioning the Vulcănești–Chișinău power line (deadline: 31 August 2026; still not commissioned as of the report's presentation)

Commitment. §4.10.2, p. 91: “completion and commissioning of the 400 kV Vulcănești–Chișinău overhead power line by the end of August 2026”[76]. The deadline was repeated in the investiture speech[77] and therefore pledged twice.

It is examined separately from the first five commitments because it has its own explicit calendar deadline within the review period.

On 1 July the Ministry of Energy announced the completion of construction and the start of testing[78]. On 21 August it reported a problem with a current transformer and demanded urgent repairs[79]. The Government's heating-season plan of 9 September moved commercial operation towards the end of October[80]. On 27 October the commission for acceptance of work at the Chișinău substation was convened, marking the start of the acceptance process rather than commissioning. According to the Minister of Energy, the revised target was late October to early November, the sixth postponement compared with the original December 2025 deadline.

Attribution. The technical issue and a substantial part of the delay predated the present Government. The 31 August deadline was nonetheless expressly adopted in both the Tofan Government's Programme and its investiture speech; responsibility for meeting it therefore rests with the current cabinet.

The delay also puts European financing at risk. Measure 117 of the Reform Agenda requires an operational, compliant power line, originally by December 2025, linked to EUR 15,479,289.94[81]. This is the amount associated with the payment condition. In the annex to its decision of 29 September, the European Commission found step 117 not satisfactorily fulfilled: the deadline was 31 December 2025, construction was completed by then, and by 30 June 2026 the line was ready for energisation and acceptance testing, but direct electricity transmission was still not possible. The step is subject to a grace period until 31 December 2027[82]. EU rules permit funding to be withheld when conditions are unmet and reduced if deficiencies persist[83]. The grace period lowers immediate financial risk but does not change the Programme's 31 August 2026 deadline.

Verdict: Not completed by 31 August. The Programme deadline expired without commercial operation, and the line was not operational on 30 October; only acceptance procedures had begun. Even if operation starts later, the accurate description will be “completed late”, not “completed on time”. We request from the Government the status of measure 117, the amount withheld and the recovery timetable; and from the Ministry of Energy and operator, acceptance, operation and penalties actually recovered.

High-social-impact commitments (Nos. 7–11). Nos. 7, 9 and 10 are multi-year, so only decisions within the period are assessed. Nos. 8 and 11 contain a 100-day initiation element and a multi-year element.

7. Energy protection and reducing vulnerability

Commitment. §4.10.3, pp. 91–92; §4.10.7, p. 94; energy efficiency, §4.10.5, p. 93[84]. Immediate assistance and long-term reductions in consumption are assessed together. The Programme pledges “well-targeted” compensation (§4.10.7) and, for 2026, a budget exceeding MDL 200 million for apartment-block renovations, at least nine demonstration projects, contracts with at least 30 associations covering over 3,000 apartments and renovation of approximately 160 extremely vulnerable rural houses (§4.10.5).

The compensation portal states that registration for the new season starts on 2 November[85]; a draft amendment to the 2026–2027 mechanism underwent public consultation in September–October[86]. These demonstrate preparation, not actual coverage of bills in the forthcoming winter, when the gas tariff has risen 81% in two months (Part I, section 2).

For renovations, the National Centre for Sustainable Energy (CNED) reported on 16 October that the first two Casa Verde calls had received 1,745 applications, with 633 projects started, 137 completed and 33 disbursements approved[87]. Completed projects account for 7.9% of applications and approved disbursements for just 1.9%. These are stages in a cumulative process, not outcomes entirely generated during this Government's term. They reveal a gap between expressed demand and completed assistance. Co-financing requirements may restrict poorer households' access.

Verdict: Ongoing. Preparations for the scheme are visible, but actual relief on bills cannot be measured before the heating season. Risks remain concerning coverage and adequacy of protection. We request that the Ministry of Labour, Ministry of Energy, ANRE and CNED publish household bills after assistance by income group, actual payments and measured savings from renovations.

8. Functional audit and administrative efficiency

Commitment. Programme, Priority 3, p. 14: “a comprehensive functional audit of central administration and agencies, with binding deadlines for eliminating unnecessary functions and merging or dissolving institutions with overlapping responsibilities”; §4.6.4, p. 61[88]. The speech promised only initiation within 100 days: “We will begin

the functional audit of the administration and the inventory of public property.”[89] Thus, initiation is the 100-day component; net savings are a multi-year outcome.

On 22 September the Government referred to an exercise covering 161 institutions with some 52,000 employees and differentiated cuts in the 10–30% range[90]. That range does not demonstrate how institutions are distributed across the thresholds or that any savings have been achieved. No consolidated figures allow institutions with actual cuts of 10%, 20% and 30% to be counted. On 21 October a decision adopting the methodology for assessing institutional compliance was approved[91], a regulatory step.

Net savings must be calculated after severance payments, reorganisation costs and any outsourcing of the same functions. If an institution spends less but citizens face longer waits or higher travel costs, part of the burden has been transferred rather than eliminated. The main regional risks are reduced access to services following reorganisation and the transfer of responsibilities without resources.

Administrative efficiency must also be measured by institutions' ability to manage risks and protect citizens. The October cyber incident exposed a concrete failure of data protection in the affected services. According to the Agency for Electronic Governance's (AGE) preliminary findings of 27 October, exploitation of vulnerabilities in certain unauthenticated public services enabled unauthorised extraction of information associated with approximately 750,000 personal identification numbers (IDNPs). As a precaution, 82 public services and more than 30 information systems and administration panels were disconnected. Citizens faced heightened risks of fraud and manipulation, as well as loss of access to some services. The subsequent blocking of the attack and restoration of services cannot undo the breach of confidentiality that already occurred. A high ranking in the National Cyber Security Index (NCSI) is not a substitute for effective protection: the index assesses legislation, institutions and documented capabilities but cannot guarantee the security of each system. Vulnerabilities may predate the current Government, but finding and remedying them are its present responsibilities. An assessment should establish whether risks were identified and addressed in time, how quickly the incident was contained and what protection was offered to those affected. Urging vigilance does not transfer the state's duty to protect citizens' data to the citizens themselves. The incident is discussed as a test of administrative functioning, not as an additional 100-day commitment.

Verdict: Ongoing. The 100-day initiation component is documented: the 161-institution exercise and the methodology approved on 21 October. Net savings and the distribution of cuts have not been publicly demonstrated, nor were they promised within 100 days. Separately, the cyber incident exposes deficiencies in data protection and service continuity; individual responsibility remains to be established through investigation. We request from the State Chancellery and Ministry of Finance an institution-by-institution table showing baseline, decision and actual result; and from the Government and cybersecurity authorities an independent incident assessment, public findings that do not compromise system security, determination of responsibility, verifiable remediation deadlines, and information and support for affected people.

9. Local government reform and service continuity

Commitment. Programme, p. 14: “administrative-territorial reorganisation around strong mayoralties, with fundamental restructuring of the district level”[92]. The speech: “We will continue the ongoing amalgamation process.”[93] This is a multi-year commitment. The new structure is intended to take effect following the 2027 general local elections.

Only decisions made between 22 July and 30 October 2026 are assessed.

What has the Government done? On 8 October the Government presented a new administrative-territorial map: 273 mayoralties and three regions (North, Centre, South) instead of 32 districts, with Taraclia becoming a second-level municipality[94]. This model differs from the April 2026 reform concept, which envisaged 10 districts[95]. The Government cites around 115,000 people consulted in more than 1,200 meetings, but these consultations took place throughout a reform process begun before its term, mostly concerning the 10-district model. The three-region model was only presented publicly on 8 October. The bill published in October reduces the number of mayoralties from 892 to 274 and imposes a minimum population threshold of 3,000 inhabitants, already proposed in the concept[96]. The bill remains under Government review and consultation. Between 28 October and 5 November the Government is holding what it calls “a new round” of consultations on the legislative package, including regional responsibilities. Earlier rounds did not provide reasoned responses to communities objecting to the proposed configurations.

The test. Territorial reorganisation is a means, not an end. The number of mayoralties is not, on its own, a performance indicator. We examine: (a) reform sequencing and evidence—competences and funding for each level

of administration and an impact assessment; (b) consultation quality—whether communities can influence configurations and receive reasoned responses; and (c) effects on local autonomy and access to services.

Finding 1. The map preceded powers and funding. The legislative package sets the map, composition of regional councils and their general responsibilities for regional development. However, concrete powers and financing are deferred to separate acts, while the Concept for the second level postpones redistribution of powers and adjustment of local finances until 2027. Meanwhile, district responsibilities for health, education and social assistance are transferred to central authorities. Responsibilities are therefore being decided through centralisation ahead of and separately from the map.

The relationship with Regional Development Agencies (RDAs) is also unclear. The administrative regions cover the same territories as the North, Centre and South development regions, where RDAs subordinate to the ministry already operate. The Concept promises “distinct” roles but leaves specific powers to subsequent acts. Who will decide regional investment priorities—the elected council or an appointed agency—remains unresolved.

The consequences are direct:

- The appropriateness of the proposed configurations cannot be assessed because it is not known which services will remain local or with what resources.
- As of the review date, the published documents do not specify the powers and budgets of the future regional councils or the division of roles with RDAs.
- The new authorities risk being assigned responsibilities without proportionate resources. In 2025, the Congress of Local and Regional Authorities had already found that Article 9(2) of the European Charter of Local Self-Government was not being respected[97].

Finding 2. The configurations lack verifiable justification. The explanatory note acknowledges that the bill “does not, in itself, allow a credible estimate of net savings for the reform as a whole”, while reorganisation costs are to be calculated later. Neither the effects on local budgets nor distances to new administrative centres and access to public transport are presented. In the Movement's assessment, the criteria are stated in general terms, without an appraisal of each configuration, and are applied inconsistently:

- A population threshold of 3,000 is presented as a rule, but the Chioselia Mare commune is constituted with 2,867 inhabitants, with enforcement postponed until 2031. The bill does not explain why comparable exceptions could not apply elsewhere.
- For the village of Bașcalia, the State Chancellery invoked territorial continuity, although community documents show that the link to the proposed centre passes through the Autonomous Territorial Unit of Gagauzia and the town of Basarabeasca, a journey of about 35 km without direct public transport.

Without verifiable criteria, configurations cannot be challenged on an evidence-based basis, potentially fuelling doubts about the motives behind decisions.

Finding 3. Consultation safeguards are missing precisely where the reform is applied. According to the Movement's analysis, Article 20 of the bill requires the results of consultations with residents and the justification for territorial changes to be submitted to Parliament. However, paragraph (3) exempts voluntary and statutory amalgamation—the reform's very instruments—from this requirement. The bill mentions consultation with affected communities but does not set out procedures, deadlines or an obligation to provide a reasoned response.

The 2026 experience shows why this gap matters. The Movement documented six cases: Bașcalia, Ștefan Vodă, Sofia, Baraboi, Ciuciuleni and Botnărești. Configurations contested by these communities were included in the bill. Available documents do not show that any of them received a reasoned response to their objections.

Finding 4. The bill gives legal form to a practice initiated without a legal basis. In August the State Chancellery notified local authorities of the “initiation of statutory amalgamation”, with stages and deadlines, even though the law then in force (Law No. 225/2023) regulated only voluntary amalgamation, while statutory amalgamation had merely been announced as a future stage.

The Congress of Local Authorities of Moldova (CALM) pointed to the lack of a legal basis and, on 25 August, called for the forced amalgamation of settlements outside the legal framework to be halted. The bill now converts these configurations into law without answering the objections. In the Movement's view, such instructions to local authorities without a legal basis exceed the limits of Article 8(1) of the European Charter of Local Self-Government.

Finding 5. Recentralisation presented as “strong mayoralties”. Important district-level responsibilities are moved upwards to central government rather than downwards to mayoralties. Under the Concept for the second level, education, family doctors' offices, public health centres, archives and chief architects are transferred to ministries and central agencies; mayoralties receive mainly cultural and sports institutions and local roads. This continues the transfer of social assistance to the Ministry of Labour in 2024, while the new regions “will not provide public services”. In 2025 the Congress had already found that recentralisation of social services and education was contrary to the principle of subsidiarity (Article 4(3) of the Charter). The Concept does not address compatibility with Articles 110 and 113 of the Constitution, which provide for districts and the district council's role, exposing the reform to a risk of unconstitutionality.

The Movement's position. The Movement does not dispute the need for local government reform, but challenges how it is designed. The identified flaws concern the architecture of the reform, not isolated drafting issues. It therefore calls for the withdrawal of the bill and a restart of the process in the proper sequence: powers, funding, criteria, consultations and only then the map.

Verdict: Ongoing (but moving in the wrong direction). Development of the reform has progressed through the second-level concept, map, legislative package and consultations; final results were not due within 100 days. In the Movement's assessment, the documents disclose substantive problems: the map precedes powers and funding, configurations are not verifiably justified, there is no evidence of reasoned replies to objecting communities, and significant powers are being moved to central government.

We request that the powers and financing of each administrative level—including the division of responsibilities with RDAs—be settled before the map is approved; that an impact assessment and criteria applied to each configuration be published; that objecting communities receive reasoned responses; and that a consultation procedure be established by organic law, with clarification of compatibility with Articles 110 and 113 of the Constitution.

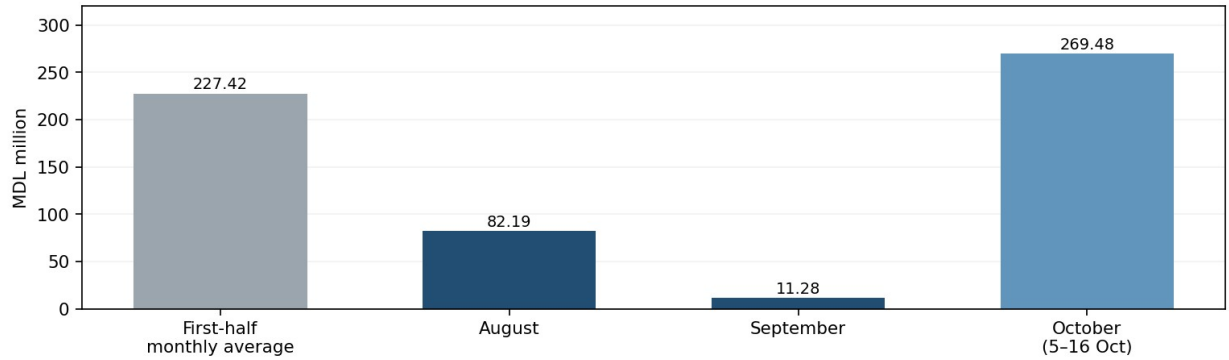
10. Predictable and transparent agricultural support

Commitment. §4.3.1, p. 36: “transition to a predictable, transparent and multi-year subsidy system with clear eligibility and performance criteria” and “reorganisation of AIPA”[98]. The speech promises: “Agriculture—from compensation to investment”. The test has two components: (a) predictability of payments—support received on known dates, not only aggregate volumes—and (b) a shift from compensation towards investment.

The pace of approvals and payment predictability. In the first half of the year, the Agency for Intervention and Payments for Agriculture (AIPA) reported MDL 1,364.49 million utilised, averaging MDL 227.42 million monthly[99]. Payments authorised amounted to MDL 82.19 million in August[100] and MDL 11.28 million in September[101]. A further MDL 49.15 million was authorised from 12 to 16 October[102], while authorisations for 5–16 October totalled MDL 269.48 million, including MDL 220.33 million for 5–9 October (authors' calculation as the difference from the MDL 362.95 million total for August–16 October). These figures alone cannot establish whether AIPA's work accelerated or slowed. Financial volume depends on the number of applications, amounts requested, types of measures and complexity of verification. A small number of investment files can represent a larger value than numerous compensation applications. Moreover, authorisation does not mean that funds have been transferred to beneficiaries, and authorised amounts are not directly comparable with amounts reported as utilised.

Delays can arise during application review and authorisation or after authorisation, depending on funding available for payment. To determine responsibility, one needs the number and age of outstanding applications, processing time, the value of authorised but unpaid obligations and the funds available to cover them. For the commitment being assessed, the relevant outcome is whether farmers receive assistance at known and respected deadlines. Publishing aggregate sums does not demonstrate this predictability or identify the reasons for delays.

Figure 3. Monthly flow of AIPA authorisations compared with the first-half monthly average (MDL million). Source: AIPA[103]; authors' calculations.



What can be said about predictability? For a farmer, it means knowing when an application will be reviewed and how long the period from submission to payment will be. Public data indicate:

(a) Timetable: no public payment schedule broken down by measure could be identified. AIPA authorises applications only within available resources[104].

(b) Age: in 2025, post-investment payments were made for 606 applications from 2023 and 730 from 2024[105]. The 3,768 complementary applications submitted in 2025 had not been authorised in the first half of 2026; payments began in October, 12–20 months after submission (authors' calculations)[106].

(c) Outstanding requirements: on 1 July AIPA estimated the funding needed for applications under review at approximately MDL 1.8 billion, against available resources of MDL 928.59 million. The stated cause is insufficient 2026 budget funding compared with applications carried over from 2025[107]. October's complementary payments came from reallocated unspent resources rather than new funding.

Conclusion. Predictability is therefore unproven, not because volumes fluctuate but because there is no public timetable and applications structurally wait more than a year. The 2026 budget predates the Government's term, while the pace of payments and any additional appropriations are the Tofan Government's responsibility. For a farm with loans, wages and suppliers, late support may necessitate additional credit or selling crops on unfavourable terms.

From compensation to investment? Of the MDL 362.95 million authorised between August and 16 October, MDL 281.78 million (77.6%) is compensatory or complementary, mainly for 2025 applications. Only MDL 73.08 million (20.1%) is investment-related (post-investment payments, advances and LEADER), MDL 5.38 million (1.5%) concerns insurance premiums, and MDL 2.71 million (0.7%) is not detailed in the source.

Figure 4. AIPA-approved units by measure type (A) and structure of amounts by payment type (B), August–16 October 2026. Source: AIPA[108]; authors' calculations. Units differ (applications, projects and beneficiaries) and are not comparable across periods.

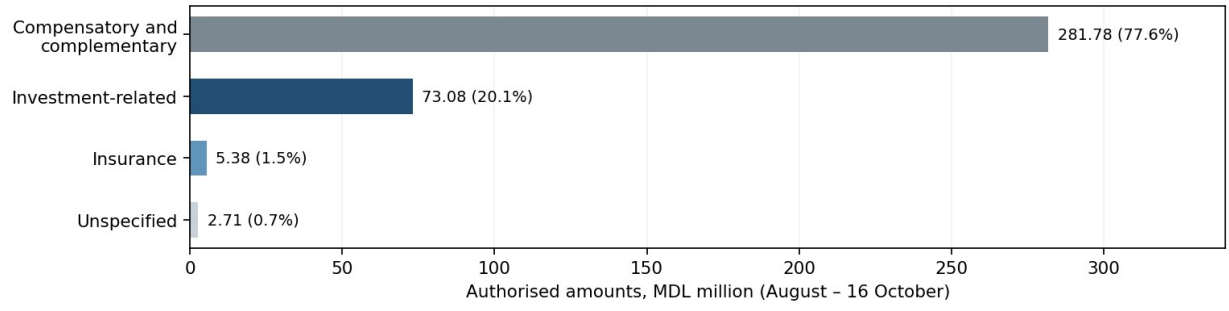


Figure 4 reproduces the aggregate payment mix from the text. The source chart A reports unit counts of 556 (August), 123 (September), 1,567 (5–9 October) and at least 300 (12–16 October), across different unit types. Source chart B reports MDL 82.19m, 11.28m, 220.33m and 49.15m for those periods, respectively.

Verdict: Partial. The Government resumed payments in October (MDL 269.48 million during the known weeks, following September's MDL 11.28 million), but has demonstrated neither the predictability promised in the Programme (no public schedule, with 2025 applications paid 12–20 months after filing) nor the speech's announced shift from compensation to investment: about 78% of authorisations between August and 16 October were compensatory or complementary. “Partial” reflects the resumption of payments, not fulfilment of the objectives. We

request a measure-by-measure payment timetable and the age of paid applications (AIPA and the Ministry of Agriculture), the balance of overdue unpaid support and a decision on additional funding for 2025 applications (Government and Ministry of Finance), and the investment share of total payments.

11. Public property and privatisation

Commitment. §4.1.8, pp. 24–25: “inventory and digitisation of state assets; fair and transparent use of them” and transparently selected boards with at least one-third independent members[109]. The speech assigns only the start of the inventory to the first 100 days[110]. We assess initiation (the 100-day component), then auditing, competitive management appointments and transparency in asset use (multi-year elements). The existing register does not prove completion of a new inventory[111].

The Public Property Agency (APP) report as at 21 October covers 33 districts and municipalities: over 12,500 plots of land appear in lists attached to draft Government Decisions, and more than 2,500 buildings are reported as delineated[112]. APP specifies that inclusion does not mean cadastral registration has been completed. The work continues a project launched in 2019, so the totals are not exclusively achievements of the new cabinet.

In October APP reported no bids in the privatisation tender for the Chișinău Glass Factory[113] and an intention to relaunch procedures for four enterprises: Zarea, Izomer, Știința and Lumina[114]. Offering assets for privatisation did not result in an ownership transfer or proceeds. The lack of bids does not prove favouritism, but neither does it demonstrate efficient use of the public estate.

On 28 October, on APP's initiative, the Government updated the list of assets subject to privatisation: 17 entries corrected, six removed and four added. One building and three non-residential spaces were transferred from the state's public domain to its private domain, with auction designated as the privatisation method[115]. This is an adopted decision, not a completed sale: the justification for disposal, valuation and effective competition must be assessed, and changing the list does not establish that advantageous sales have occurred.

Verdict: Ongoing. Initiation of the inventory within 100 days is evidenced by asset delineation, which continues a project started in 2019. Completion of the inventory is not proven, and the reviewed privatisation procedures resulted in no transactions; the list was updated on 28 October. We request that APP disclose how many state assets have actually been registered out of the total and the current registered count.

12. Evaluation of ministers' performance

Commitment. Investiture speech of 21 July 2026, “Method of implementation” section[116]: “Each minister will have objectives, deadlines and indicators. Progress will be examined regularly by the Government and publicly reported.” It also promises to “say where the blockage lies and who must resolve it”. The Programme promises “a single platform and dashboard” with “quarterly evaluation of each institution” (p. 13) and performance evaluation of each ministry against EU accession commitments (p. 12)[117]. This is a cross-cutting obligation. The passage does not specify a day for a formal evaluation or promise automatic reshuffles after 100 days; it nevertheless permits verification of whether objectives and public reporting exist.

Item examined: objectives and indicators for each minister. Finding as of 30 October: no consolidated public set of individual scorecards with baselines, targets and deadlines was identified.

Items examined and findings as of 30 October 2026

- Periodic review of progress: no public results were identified for evaluations of each minister against their own targets.
- Reporting deviations and corrections: announcements of sectoral decisions do not allow delays, responsible parties and corrective actions to be systematically reconstructed.

These findings concern public documents on the Government and State Chancellery portals; they do not establish that no internal evaluations took place. The distinction between internal evaluation and public reporting is precisely the issue: without targets published in advance, criteria can be adjusted after results are known.

Verdict: Not demonstrated. Implementation of a mechanism for evaluation and public reporting has not been demonstrated. We do not claim that a deadline was missed where the official source sets none. We request publication alongside the Government's performance review of an individual scorecard for each minister: objective, baseline, target, deadline, result, evidence source, deviation and corrective action.

13. Central mechanism to monitor European commitments

Commitment. The investiture speech's 100-day list states: “We will put into operation the central mechanism for monitoring European commitments...”[118]. The Programme describes the tool as “centralised planning of accession commitments”[119]. The obligation is not in the Programme's 100-day list (p. 12); it appears only in the speech.

Reports submitted by the Moldovan side for the EU Enlargement Package are not public. According to the Movement's review, the Government website page for the Enlargement Package (Bureau for European Integration) contains only information sheets and Commission assessments, not the Moldovan authorities' reports. Society can see what the Commission says but not how the Government reports on implementation of its recommendations, preventing verification of the mechanism's results.

Verdict: Not demonstrated. Reporting of Moldova's contribution to the Enlargement Package is not public. We request that the State Chancellery publish the Moldovan side's Enlargement Package reports, showing the implementation status of each Commission recommendation.

Conclusions, Rating and Requests for the Government Review

Final conclusion

The report does not support the portrayal of a Government record beneficial to citizens. The Tofan Government's results after 100 days are fragmented, largely at the document level and, in most cases, lacking completion or evidence through which their impact can be verified. Of the six commitments with explicit deadlines in the Programme, one was not fulfilled (the Vulcănești–Chișinău line, due 31 August and promised in both Programme and speech, is the report's clearest finding), one lacks a demonstrated final outcome (inspections), three are partial (barrier inventory, deregulation and industrial portfolio), and one was completed procedurally (tax policy). Of the three activities added by the speech, initiation of the functional audit and asset inventory is documented; the European commitments monitoring mechanism is not publicly substantiated.

Timely adoption of the tax package cannot be portrayed as a major achievement of this Government: the bill was inherited from the Munteanu Government at an advanced stage, and the Movement considers its effect on ordinary citizens negative because about 84% of projected additional revenue (MDL 4.3 billion out of 5.1 billion) comes from consumption while annual inflation is 8.60%. The impact across income groups has not been published; the assessment would be reviewed if the Ministry of Finance released its simulations. “Completed” relates solely to the procedural obligation.

None of the multi-year commitments (Nos. 7, 9 and 10) yet has a demonstrated social outcome: registration for compensation begins only on 2 November, while in agriculture about 78% of amounts authorised from August to mid-October represent compensatory or complementary payments for 2025 applications. Nor has the Government published an action plan derived from the Programme, an instrument required under Article 34 of Law No. 136/2017. The Movement advocates public presentation of a concrete implementation timetable within the first 30 days as an accountability standard (cross-cutting finding in the executive summary).

Rating the Tofan Government's first 100 days

The Movement proposes a summary score on a scale of 1 to 10, calculated from four criteria. The weight represents each criterion's importance to citizens; the score reflects what has actually been demonstrated rather than declared. Weights are ordered by citizen impact: delivery of commitments, tangible outcomes, risk management and, finally, quality of evidence and transparency.

Criterion: Fulfilment of time-bound commitments (nine obligations: six from the Programme and three from the speech). Weight 40%; score 3.3/10. Calculation per obligation: completed 1; partial 0.5; ongoing 0.25; not demonstrated or not completed 0. One completed + three partial (Nos. 3, 4 and 5) + two ongoing (Nos. 8 and 11) = 1 + 1.5 + 0.5 = 3 out of 9, or 33%, equivalent to 3.3/10. If the inherited tax policy is assigned 0.5, the score falls to 2.8.

Criterion: Tangible outcomes for citizens. Weight 30%; score 2/10. No measured social benefit during the period: compensation has not been demonstrated at the required scale, Casa Verde has 7.9% of works completed, and agricultural support is irregular. Real wage growth in the second quarter predates the term.

Criterion: Risk management and protection of vulnerable groups. Weight 20%; score 3/10. The compensation mechanism has been prepared but is not yet operational; the Vulcănești line has repeatedly been postponed; a state of emergency was declared in the energy sector on 26 September; agricultural support payments remain irregular.

Criterion: Quality of evidence and transparency. Weight 10%; score 4/10. Monthly or weekly data (AIPA, APP, CNED) and draft acts for consultation are published, but public registers, ministers' scorecards and the primary source for the figures of 200 complaints and 63 barriers are missing.

Weighted rating: 100%; 2.9/10. Formula: $0.4 \times 3.3 + 0.3 \times 2 + 0.2 \times 3 + 0.1 \times 4 = 2.92$.

Methodological note: this is the Movement's assessment, not a statistical measurement. It reflects the situation on 30 October. Sensitivity: if tax policy is assigned 0.5, the weighted score is 2.7.

Why 2.9/10? The score is well below the midpoint because the three highest-weight criteria show few demonstrable results. Of nine time-bound obligations, only one is completed (tax policy, procedurally and largely inherited), three are partial (Nos. 3, 4 and 5), and two (the functional audit and asset inventory) have merely begun. The one commitment with its own calendar deadline, the Vulcănești line, was not completed. Living costs increased without measurable protection for vulnerable groups. The score is not lower because the Government did initiate promised processes (barrier inventory, functional audit, asset delineation), secured the release of the third instalment (European Commission decision of 29 September 2026 for reforms largely carried out before its term) and prepared the compensation mechanism. These are nevertheless procedural activities, not outcomes.

Requests for the Government's performance review

To close the first-100-days assessment, we request publication of the following verifiable information:

- The Government Action Plan, with action, responsible party, deadline, indicator and funding for every Programme commitment, or its approval date and publication address.
- A register of all nine time-bound obligations with final acts, effective dates and measured results; for unfinished measures, the reason and new deadline; the location and date on which the European commitments monitoring mechanism became operational.
- Winter preparedness: actual fuel stocks, deliveries to households and completion of the 9 September plan deadlines; household energy bills after compensation by heating source and income category.
- Public debt: a plan to reduce borrowing rates, a monthly calendar of borrowing in 2026, its purposes and average cost, and the financing plan for the 2027 deficit.
- Tax policy for 2027: public simulations of the effect of diesel excise duty and VAT on monthly gas consumption above 150 m^3 on households, transport and agriculture.
- Details of each reorganised institution, including reductions of 10%, 20% and 30%, baselines, transition costs and net savings; continuity of local services after reorganisation.
- Fact sheets on industrial and logistics projects, with confirmed funding, selection criteria and physical implementation status; for public property, valuations, tender results and purchaser obligations.
- The balance of unpaid agricultural support, the age of applications and the number of files by measure.
- Ministers' individual performance scorecards and evaluation results, together with a register of civic proposals, reasoned responses and accepted measures.

Annex. Inventory of Commitments

This annex lists obligations falling due within 100 days under the Programme and investiture speech, followed by social-impact commitments assessed without that deadline. The Programme contains one 100-day list (p. 12)[120]. The speech enumerates six activities in the paragraph on the first 100 days[121].

A.1. Obligations due within the 100-day period

No. 1. Limiting excessive inspections / risk-based oversight. Programme: “limiting excessive inspections” (p. 12). Speech: “limit non-essential inspections and adopt risk-based oversight”.

No. 2. Tax policy for 2027. Programme: “adoption” (p. 12). Speech: “present” the tax policy.

No. 3. Inventory of administrative barriers. Programme: “launch” (p. 12). Speech: “continue” the inventory and review of authorisation requirements.

No. 4. Reducing burdens by amending the legal framework. Programme: “amending the legal framework” (p. 12). Speech: implicitly included in “review of authorisation requirements”.

No. 5. Portfolio of priority projects. Programme: industrial and logistics (p. 12). Speech: industrial, logistics and infrastructure.

No. 6. Vulcănești–Chișinău line. Programme: by the end of August 2026 (§4.10.2, p. 91). Speech: same deadline.

No. 8. Beginning the functional audit. Programme: general functional audit without a 100-day deadline (p. 14). Speech: “begin” the audit.

No. 11. Beginning the inventory of public property. Programme: §4.1.8, pp. 24–25, no 100-day deadline. Speech: “begin” the inventory.

No. 13. Central mechanism for monitoring European commitments. Programme: described on pp. 11–13, without a 100-day deadline. Speech: “put into operation” the mechanism.

Other commitments assessed (without a 100-day deadline) and selection criteria

No. 7. Energy protection and efficiency. Programme: pp. 91–94. Criterion: social impact (bills), financial importance.

No. 9. Local government reform. Programme: p. 14. Criterion: impact on access to services.

No. 10. Predictable agricultural support. Programme: p. 36. Criterion: rural social impact; monthly public data.

No. 12. Evaluation of ministers' performance. Source: investiture speech, “Method of implementation”. Criterion: cross-cutting transparency commitment.

Areas with Programme commitments not assessed in this report: justice, security, social affairs, health, education and digitalisation. Assessing them is beyond the scope of “The Economy and the Cost of Living”.

References and Source Links

References 1–121 follow the numbering in the original report. Bibliographic titles are retained in Romanian for reliable identification; the hyperlinks use the exact destinations embedded in the original PDF.

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