UNCTAD/SITE

Trade Point Programme
I. TRADE POINT SURVEY RESULTS

July 1997

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Chapter I: IntroductionChapter I: Introduction

1. Background and main objectives. Background and main objectives

This report outlines the major findings of a survey carried out by the UNCTAD Trade Point Programme in 1996. The survey was addressed to all operational Trade Points and was the first systematic survey implemented since the launching of the programme and the establishment of the first Trade Point in 1992. Four years later, a sufficiently large number of Trade Points had reached operational status and had been in operation for several years; they were therefore in a position to provide meaningful results for a survey evaluating the Trade Point performance.

The main objective of this survey was to obtain data which would allow UNCTAD to produce a report on the situation of the Trade Points. Specifically, the survey intended to provide information which would answer the following questions:

- How are Trade Points organized and managed?

- Which kind of services do Trade Points offer?

- What role do information and communication technologies play in the Trade Points' operations?

- How well/not well are Trade Points doing and why?

- Who are the Trade Point clients?

- What kind and how much trade do Trade Points support? Where are the main trading partners located?

- To what extent do Trade Points apply the original model proposed by UNCTAD?

2. Survey implementation and analysis. Survey implementation and analysis

In June 1996, a 4-page questionnaire was sent to all operational Trade Points (36 at that time) via E-mail. Of the 36 questionnaires sent, 26 were completed and returned by September 1996. This represents a 72.2%-response rate and thus provides results which are representative for the whole Global Trade Point Network (GTPNet) at that point in time. Of the 26 questionnaires returned, 25 were taken into consideration in the data analysis and this report; one Trade Point had just started operations when the questionnaires were sent and was therefore left out. Hence, the results presented here reflect the situation of the following Trade Points:

1) La Plata, Argentina

2) Mendoza, Argentina

3) Santa Fé, Argentina

4) Yerevan, Armenia

5) Namur, Belgium

6) Cochabamba, Bolivia

7) Belo Horizonte, Brazil

8) Campinas, Brazil

9) Curitiba, Brazil

10) Florianópolis, Brazil

11) Fortaleza, Brazil

12) Porto Alegre, Brazil

13) Vitória, Brazil

14) Santiago, Chile

15) Beijing, China

16) Shanghai, China

17) Cartagena, Colombia

18) Cairo, Egypt

19) Tampere, Finland

20) Tel Aviv, Israel

21) Moscow, Russian Federation

22) Tunis, Tunisia

23) Montevideo, Uruguay

24) Columbus, Ohio, USA

25) San Cristobal, Venezuela

The data obtained from the Trade Points were entered into a data base, organized in 127 variables, and statistically analyzed.

The report is structured as follows:

First, a description of the data is presented (Chapter II). This includes (1) the main characteristics of the Trade Points (TPs), such as location, age, staff, financial situation, institutional set-up as well as the main services offered, and (2) the main characteristics of the Trade Points' clients, such as number of clients, size of their businesses, type of activity they are involved in as well as the geographical location of their trading partners.

The second part of the report focuses on the data analysis and interpretation (Chapter III). Two questions have been considered as of particular importance: first, how well/not well are TPs doing and why? Second, are TPs following the original model/concept proposed by UNCTAD in 1992, and if not, should the model be modified or adjusted to the TP reality? Third, what is the geographical direction of the trade flows supported by Trade Points? Results from statistical tests employed on the data will be presented. In particular, the relationships between specific variables will be examined as well as their degree of statistical importance. Where no statistical tests were applicable, descriptive statistics were used.

Finally, Chapter IV outlines the main results obtained and conclusions drawn from the survey.

Chapter II: Description of the dataChapter II: Description of the data

This chapter presents an overview of the data obtained from the survey. It provides summary descriptive statistics of the variables which resulted from the questionnaire and does not list individual Trade Point results. The first section looks at the main characteristics of the TPs, the second section at the TP clients.

1. Main characteristics of the Trade Points. Main characteristics of the Trade Points

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1.1 Location of Trade Points**1.1 Location of Trade Points**

Two of the Trade Points considered in the survey are located in Africa, four in Asia, three in Europe, one in North America and fifteen in Latin America (the latter accounting for 60% of all Trade Points in the survey). Within the Latin American region, there is a concentration of Trade Points in two countries: 7 of the Trade Points are located in Brazil and 3 in Argentina. Hence, this *predomination of Trade Points in the Latin American region* has to be kept in mind throughout the interpretation of the results.

The majority (21 or 84%) of the TPs are located in developing countries.

1.2 Age of Trade Points.2 Age of Trade Points

The Trade Point age was defined by its date of inauguration. Nearly half of the Trade Points (48%) were inaugurated between the launching of the programme in early 1992 and December 1994. It is remarkable that during the first half of 1995 more Trade Points were inaugurated than in the whole preceding year (32% compared to 24% in 1994). This can largely be explained by UNISTE (United Nations International Symposium on Trade Efficiency) which was held in Columbus, Ohio (USA) in October 1994. UNISTE officially launched the Global Trade Point Network (GTPNet) which led to many new applications for setting up Trade Points. In June 1996 (date of the questionnaire), the average age of the Trade Points was 18.5 months.

1.3 Type of entity .3 Type of entity

Trade Points were asked to indicate whether they were set up as private, public or mixed entities. Most Trade Points (60%) were created as private entities. This reflects the programme's emphasis on local initiative and the involvement of the private sector in the Trade Point. The still relative strong role of the public sector (20% of the Trade Points are public and 20% are mixed entities) demonstrates that the original TP model which suggests the participation of both public and private entities has been followed by many TPs.

1.4 Trade Point staff.4 Trade Point staff

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With respect to the number of full-time, part-time and casual TP staff, the following results were obtained: the average number of **full-time staff** per TP is 7, ranging from 1 to 30 employees. The majority of TPs (80%) also employ **part-time staff,** with an average of 3.8 per TP. One Trade Point even reported to employ 33 part-time employees. Most Trade Points (52%) also employ staff on a **casual** or temporary basis, ranging from 1 to 24 employees (mean: 2.6). The majority of these casual staff members are consultants or students.

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1.5 Approximate overall net investment in the Trade Point

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TPs were asked to estimate the total amount of investment in the Trade Point until the date of the survey, including both the initial investment as well as later expenses. 40% estimated the amount of their investment between US$ 10,000 and 50,000, 20% between US$ 50,000 and US$ 100,000, and 40% above US$ 100,000. Hence, 3 categories of TPs have been classified for further analysis: those with low, medium and high investment levels respectively. Chapter III investigates whether the amount of capital invested has an impact on the TP performance.

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.5 Approximate overall net investment in the Trade Point TPs were asked to estimate the total amount of investment in the Trade Point until the date of the survey, including both the initial investment as well as later expenses. 40% estimated the amount of their investment between US$ 10,000 and 50,000, 20% between US$ 50,000 and US$ 100,000, and 40% above US$ 100,000. Hence, 3 categories of TPs have been classified for further analysis: those with low, medium and high investment levels respectively. Chapter III investigates whether the amount of capital invested has an impact on the TP performance.1.6 Reach of break-even-point.6 Reach of break-even-point

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This question referred to the time when the Trade Point had reached or expected to reach financial sustainability. At the time of the survey (June 1996), 16% of the Trade Points had already reached break-even-point and another 16% were expecting to reach it within the next six months. 32% of the Trade Points were expecting to sustain themselves within the next year. 32% answered they will still need two years or more to reach break-even-point. This variable plays an important role in Chapter III where the financial situation of the TPs will be further discussed.

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1.7 Who are the Trade Point partners/associates? (Role of trade facilitation providers in the TP) 1.7 Who are the Trade Point partners/associates? (Role of trade facilitation providers in the TP)

Trade Points were asked to indicate the type of service providers participating in the Trade Point and on which basis (contractual or non-contractual) they participate. Answers to this question provided information on two important aspects: first, on the Trade Point partners or associates; second, on the level of trade facilitation services provided by the TPs.

Of particular interest are the results related to the providers participating on a **"contractual basis"** since these indicate who the partners or associates of a Trade Point are and reflect the extent to which TPs incorporate their services.

Most common partners on a "contractual basis" are banks (40%), transport companies (36%), foreign trade institutes (36%) and Chambers of Commerce (32%). In 24% of the Trade Points, insurance companies and Customs participate as partners, and in 16% of the Trade Points freight forwarders.

36% of the Trade Points indicated to also collaborate (on a contractual basis) with "other entities". These include export promotion centers, general authorities for export & import control, offices of exchange, import & export commodity inspection bureaus, telecommunications agencies, private information providers, universities, rural societies, Internet providers, hardware & equipment providers, senior consultants, the local government or the municipality.

Based on the above information, a new variable was created indicating the level of trade facilitation services a Trade Point provides. Three categories were defined as follows:

High Trade Facilitation: Collaboration on a contractual basis with 4-5 entities

Medium Trade Facilitation: Collaboration on a contractual basis with 2-3 entities

Low Trade Facilitation: Collaboration on a non-contractual basis or contractual-based collaboration with one entity only.

Based on this classification, 48% of the Trade Points could be found in the "low" trade facilitation range, 32% in the "high" trade facilitation range and 20% of the Trade Points in the "medium" trade facilitation range. Chapter III (2.1) provides further discussions on this

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1.8 Collaboration with other Trade Points.8 Collaboration with other Trade Points

Trade Points were asked on what issues they collaborate with other TPs in the GTPNet. Almost all Trade Points (92%) collaborate with others in the trade information area (information exchange, verification etc.), succeeded by follow-ups on business and product information (76%) and by collaboration on technical and logistical issues (60%). Hence, the advantages offered by the GTPNet - and particularly the access to partners at the global level - are widely used by the TPs.

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1.9 Trade Point marketing

The question of how Trade Points promote their services in the local business community revealed that the majority uses a very broad range of marketing instruments which were specified in the questionnaire. Most common marketing strategies are to contact potential clients personally, to publish ads in local newspapers and to promote TP services by telephone, E-mail, fax or regular mail (92% of the Trade Points). This could be called specific or target-oriented marketing. More general marketing approaches such as advertisements on TV or radio are used in 48% of the cases. 88% of the Trade Points organize special events such as seminars or trade fairs to promote their TPs.

64% of the TPs market their services on the Internet using local service providers or the UNCTAD TPDC incubator service for TPs. Chapter III will look more closely at the TPs using information technology as a marketing tool.

As "other" ways to promote the Trade Point (applied by 12%), brochures, leaflets, and other material, such as videos, were mentioned.

1.10 Trade Point services .10 Trade Point services

The question on the Trade Point partners (see 1.7) already gave some indications on the level of trade facilitation services offered by TPs. In another question, TPs were given a list of services and asked to indicate which ones they offer to their clients. Multiple answers were possible. The table below provides an overview of the services considered. The two services that seem to be "standard" for almost all Trade Points are "matchmaking services" and "follow-up on company and product information" (both offered by 88% of the TPs). They are followed by "consulting on transport matters" and "market research" (both offered by 76% of the TPs). Services such as the "issuing of trade certificates" (offered by 24%) or the "functioning as an EDI-clearing-house" (offered by 20%), are at the lower end of the scale. Among "other services offered" (24%), Trade Points mentioned Internet-access-services or market and price information.

Types of services offered by the Trade Points	% of Trade Points offering services
Matchmaking Services	88
Follow-up on Company and Product Information	88
Consulting in Transport Matters	76
Market Research	76
Translation Services	64
Production of Web Pages, Product Catalogues etc.	56
Preparation of Business Letters, Contracts, etc.	48
Provision of Facilities (business meetings, conferences)	48
Customs Clearance	44
Direct Assistance in Financial Services	40
Training Courses for Customers	28

Issuing of Trade Certificates	24
Function as an EDI Clearing House	20
Others (specified in the text)	24

Based upon the above, a new variable was created to quantify the services offered by the Trade Points. Three categories were defined:

Many Services: 10-14 of the services specified are offered

Some Services: 5-9 of the services specified are offered

Few Services: 1-4 of the services specified are offered.

The results show that 24% of the Trade Points offer "many services", 56% offer "some services" and 20% offer "few services". Chapter III offers further insights on the relationships between the amount and kind of services offered and other variables.

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1.11 Transactions carried out with the help of the Trade Point.11 Transactions carried out with the help of the Trade Point

The Trade Points were asked to estimate the number of transactions in which they were involved. Only 28% of the Trade Points answered the question; most TPs stressed the difficulty of answering this question due to the various degrees of "involvement" a TP could have in a typical transactions. Among those which answered, the average number of transactions carried out through the TP each month was 18. One Trade Point indicated to help completing 40 transactions per month.

For the same reasons, it was even more difficult to obtain information on the *value* of the transactions carried out. Of the Trade Points that were able to estimate the number of transactions, only three Trade Points (12 % of total) could indicate the approximate value. The three values given were US$ 25,000,

100,000, and 650,000 per month.

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1.12 Electronic Trading Opportunities (ETOs).12 Electronic Trading Opportunities (ETOs)

Generally, every TP participates in one way or another in the UNCTAD ETO system. All TPs can receive the ETOs disseminated daily by the UNCTAD TPDC at no charge, and several TPs also send ETOs of their customers to the network.

This question asked Trade Points to indicate how many ETOs they *receive* and how many they *send* on an average day. The number of **ETOs received** varied and was on average 51 per day. Some Trade Points answered they do not receive ETOs or did not answer the question at all (together 28%); it is possible that at the time of the survey they had not yet included ETOs in their services.

A different picture is provided from information on **ETOs sent** since this number varies according to the activity of the Trade Point, requests by its clients etc.: 68% of the TPs answered to send between 1 and 20 ETOs per day. The average number of ETOs sent per day was 8, but one Trade Point indicated to send more than 20 ETOs per day.

The next question referred to the **number of trade matches resulting from ETOs** in an average month**.** This question was answered only by a small number of Trade Points. For those, answers ranged between 20 and 50 trade matches per month.

Finally, TPs were asked to estimate the **number of transactions which resulted from ETOs** in an average month. For those which answered, the numbers indicated were between 5 and 10 transactions per month.

2. Characterization of the Trade Points' clients2. Characterization of the Trade Points' clients

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2.1 How many customers do Trade Points have?.1 How many customers do Trade Points have?

Several questions were asked about the Trade Points' clients. First, TPs were asked to distinguish between general customers and subscribers. **Subscribers** are important because they usually mean a "regular income" for the TP. The range varies widely: from 24% of Trade Points which do not have any subscribers to others having 1600 and even 18,000 subscribers. To avoid warp the statistics, the two highest numbers as well as the two lowest numbers (4 and 7) were left out in the further analysis. Without them, the average number of subscribers (of those Trade Points which do have subscribers) is 144 per TP.

The next question referred to the **number of customers per month**, excluding the above mentioned subscribers. Answers received show that the average number of

customers per month is 119.

More interesting than the "static" number of customers is its "dynamic" aspect: how, according to the Trade Points, has the number of (all) customers developed since the inauguration? Of those which answered (24 out of 25 TPs), the majority of the Trade Points (45.8%) were "satisfied" with the development of their customers, 29.2% found it "very satisfactory" and 25% "not satisfactory". Of course, one has to consider that such answers are highly subjective. For example, one Trade Point found the development of its customers "very satisfactory" and indicated to have 20 customers per month whereas another Trade Point with 700 customers found it "not satisfactory".

The numbers reflect, however, that overall TPs view positively the evolution of their customer base and do not consider it as a key impediment to their further development.

2.2 Types of enterprises using the Trade Points according to **size2.2 Types of enterprises using the Trade Points according to size** **Answers to the questions presented in the following sections (2.2-2.7) were ranked by the TPs on a scale ranging from 0 to 10, where 0 was supposed to mean ithardlyeverhappens, 5 ithappenswithamediumfrequency and 10 ithappensveryoften. Although these types of answers are very subjective, they allow to evaluate the *relative* importance of different subjects to each TP (e.g. are clients coming from the primary, secondary or tertiary sector? Do clients contact the TP in person, by telephone or fax? Are trading partners of TP clients located in Africa, Asia, Europe?). Thus, even if the perception of the *absolute* values for the evaluation of a subject might be different, it can safely be assumed that the relations *among* the values are measured objectively. Based on this assumption, the following methodology was applied: for example, if a Trade Point answered the question on activitiesofthe clients: primaryactivity (3), secondaryactivity (10), tertiaryactivity (5), the sum of the values 3+10+5=18 was equaled to 100%. Then, for this specific Trade Point, primaryactivity (3) accounts for 16.7% of all clients, secondary for 55.5% and tertiary for 27.8%. This was done for all Trade Points and an average for the values of primary etc. calculated. As a result, one receives the mean for, like in our example, the relevance of primaryactivity to all Trade Points. Another methodology leading to the same results would be to summarize all values (i.e. of all TPs) of the variable primaryactivity, then the values of secondary and tertiary, add the three sums up, equal the value to 100% and so obtain the percentages for all Trade Points.**

A series of questions was asked to obtain more details on the types of enterprises using the TP. The first question referred to the size of the companies. Four categories were provided: micro (1-10 staff), small (10-50 staff), medium (50-500 staff), and large (>500 staff). Results show that an overwhelming majority (85.7%) of the TP customers fall into the first three categories (micro, small, medium). Among them, 31.6% are microenterprises. Large enterprises account for 14.3% of the Trade Point clients.

These numbers demonstrate that one of the main goals of the Trade Point Programme - namely to reach SMEs - is clearly met and that TP services respond to the needs of this target group. Of particular interest is the relative high percentage of microbusinesses using the TP. This number, in combination with the location of the companies' trading partners (see 2.6) shows that TPs also play an important role in facilitating local trade.

Further discussions are provided in Chapter III.

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2.3 Types of enterprises using the TP according to .3 Types of enterprises using the TP according to **branch**

The branches of activity used were "producers", "wholesalers", "retailers" and "others". The results show a rather homogeneous distribution of the enterprises across the different branches with a slight majority coming from the production sector (31.1%). Interesting was the listing of numerous Trade Point users in the category "other branches" (19.3%); they include consultants on international trade, service providers, municipalities or local governments.

2.4 Types of enterprises using the Trade Point according to **sector**.4 Types of enterprises using the Trade Point according to **sector**

The kind of activity the clients of the Trade Points are involved in covers the three main sectors (primary, secondary, tertiary). The majority of the companies (43.2%) come from the secondary sector, including industry and manufacturing of all kind. The second main sector is the tertiary sector (34%) whose activities include all kinds of services, for example tourism or consultancies. Primary activities, including agriculture, fishing etc., account for 22.8% of the clients.

2.5 Type of communication the customers use to contact the Trade Point.5 Type of communication the customers use to contact the Trade Point

The most common medium of communication between Trade Point and customer is fax (27.2%), followed by telephone (26%). Personal contact (22.6%) is another frequently used way to communicate with the Trade Points. Personal attention requires a lot from the Trade Point in terms of staff-availability, time and competence; on the other hand, it also facilitates a more efficient and targeted service towards the client. Regular mail (7.9%) and telex (0.7%) are rarely used by the clients.

15.6% of the customers use E-mail to contact the TP. Given that the large majority of TPs is located in developing countries with low-quality telecommunication services, this number is relatively high.

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2.6 Location of the customers' trading partners .6 Location of the customers' trading partners

Trade Points were asked about the location of the trading partners with whom their clients do business. The main objective of this question was to find out at which geographical level (local, national, continental, global) the TP users mainly trade and to determine the direction of the trade flows which are promoted by TPs. Continental trade plays the most important role (28.2%), closely followed by global trade (27.1%) and local trade (25.4%). National trade accounts for 19.3%.

The high percentage of continental trade can be explained by the predominance of Latin American TPs in the survey. Intra-regional trade plays a major role in this region, and will become even more significant in the future with the expansion of regional trade pacts (especially Mercosur).

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2.7 Location of trading partners at global level2.7 Location of trading partners at global level

Among the TP clients' trading partners located at the global level (27.1% of total trading partners), Trade Points were asked to specify the geographic areas (continents) with which their customers trade.

Accordingly, Africa receives the lowest share (8.3%), followed by the Asian and Pacific region (16.6%). Overall, most trade relations seem to exist with Europe (26.4%), followed closely by North America (25.3%) and Latin America and the Caribbean (23.4%). Again, this can be explained by the dominance of Latin American TPs which, in comparison to intra-continental trade and trade with Europe, have rather few commercial relations with Africa or Asia.

Chapter III explores the trade flows in more detail.

Trade flows between continents (% of TP clients' total global trade)

From / To	**World**	**Africa**	**Asia / Pacific**	**Europe**	**Latin America**	**North America**
Africa	8.3	17.7	9.0	6.7	6.5	13.0
Asia/Pacific	16.6	19.8	23.1	19.7	13.2	21.7

Europe	26.4	28.2	38.3	34.0	21.6	21.7
Latin America	23.3	12.1	4.9	12.2	32.7	21.7
North America	25.3	21.9	24.4	27.3	25.8	21.7

Chapter III: Data analysis - a closer lookChapter III: Data analysis - a closer look

After having provided a detailed description of the data obtained from the survey in the second chapter of the report, this chapter uses results from statistical analyses employed on the data to discuss and interpret various aspects of the Trade Points work performance.

Particular interest was brought to the following questions:

1. How well/not well are Trade Points doing and why? Which Trade Points are more successful than others and why? What can be learnt from their successes or failures?

Four main types of information obtained from the survey have been used for this analysis: the financial situation of the Trade Points (reach of break-even-point, amount of investment), their number of

clients, the number of transactions carried out through TPs, and the TPs' own perception of their customer development (level of satisfaction).

2. Are TPs following the original Trade Point model/concept? If not, what are they doing differently? Should the original model be modified/adjusted based on the TP reality?

Again, four main aspects have been considered to analyze these questions: the organizational set up of the TP (what kind of entity is it), the role of trade facilitation services, the role of the network and electronic tools, and the clientele of the TPs (size of enterprises; type of activity).

In order to answer these questions, a series of statistical tests have been carried out with the objective to determine the level of (in-) dependence between certain variables. The following sections summarize and interpret the test results. Thereby, the following definitions were used:

- "Strong" associations reflect values between 100-60.
- "Relatively strong" associations reflect values between 60-40.
- "Less strong" associations reflect values between 40-30.
- "No" associations reflect values below 30.

In order to increase the readability of the document, the values obtained from the tests have been included in Annex 1.

1. Success of the Trade Points 1. Success of the Trade Points

This section gives a closer look at the development of the Trade Points and how successful they have been so far. The following aspects will be discussed. First, the level of satisfaction of TPs regarding the development of their customer base will be examined. This will be followed by an analysis of the financial situation of the Trade Points. Then, the role of the number of customers TPs have will be discussed. Finally, consideration will be given to the role played by TPs in completing trade matches and conducting trade transactions.

1.1 Satisfaction of TPs with the development of their customer base.1 Satisfaction of TPs with the development of their customer base

Most TPs are satisfied with the development of the number of their customers since they started to

operate (29.2% are "very satisfied" and 45.8% are "satisfied", see Chapter II, 2.1). In order to find out which TPs are more and which are less satisfied, a number of statistical tests were run on the relationship between this variable and others, or to what extent this variable is influenced by others. The following results were found:

A *relatively strong* association was found between the level of satisfaction with the customer development and the reaching of the break-even-point of the Trade Points. In other words, those TPs which have reached or are close to reaching financial self-sufficiency are also those which have positively experienced the evolution of their customer base.

Other, *less strong* associations were found with the level of investment, the number of staff, the number of services offered, the level of trade facilitation services the TPs offer or the number of TP partners, and their age. In other words, TPs which were happier with their customer development were also found to have higher values of the mentioned variables. In addition, TPs which are set up as private entities were found in the same category. The test results suggest that these variables influence the level of satisfaction regarding the customers development.

1.2 Financial situation of Trade Points.2 Financial situation of Trade Points

Financial aspects of TP operations were addressed in the questionnaire through two questions, one on the reach of the break-even-point (BEP), the other one on the amount of capital that had been invested in the TP since its initiation. Chapter II (1.6) showed that 16% of the TPs had already reached BEP by the time of the survey, 48% were expecting to reach it during the next two years, and 32% estimated to still need more than two years to become financially self-sustaining.

Regarding the amount of investment in the TP, 40% of the TPs had invested US$ 10-50,000, 20% US$ 50-100,000, and 40% more than US$ 100,000.

The two variables were crosschecked with several other variables and the results showed the following:

Regarding the reach of the BEP, a *strong* association was found with the number of transactions carried out per month with the help of the TP. *Relatively strong* associations were found with the number of customers, subscribers, and TP staff; the level of investment in the TP; the TP age; and the number of services offered by the TP. The investment level also showed relatively high values running a correlation with the reach of BEP. Furthermore, *less strong* associations were found with the number of trade facilitation services the TP offers and the type of entity the TP is (private in this case).

Hence, all of the above mentioned variables influence the time needed to reach self-sustainability. What should be pointed out is that the key variable determining the reach of self-financing is not the age of the TP (although it obviously influences it); the TP work itself (such as the quality and quantity of

the services) and the amount of capital invested in the TP have a stronger explanatory value. These are important aspects to consider when designing the TP business plan.

Regarding the amount of capital invested in the TP since the beginning, the following results were found: *relatively strong* associations exist with the number of subscribers, the number of staff (relatively strong correlation with number of full-time staff) and the use of the Internet (marketing on the Internet and production of Webpages for TP customers). *Less strong* associations were found with the number of services the TPs offer. In other words, more subscribers, more staff or a more active use of the Internet also require more investment in the Trade Point.

Hardly any association was found with the type of entity or the amount of trade facilitation services offered (or how many partners TPs have). Hence, there seems to be no indication that whether TPs are private, public or mixed entities or how many partners they have affect the amount of capital put into the TP.

No correlations were found between the amount of capital invested and the type of activity of the TP clients or from which branches they are.

With respect to the age of the TP, we found that the oldest TPs (created before 1994) showed the lowest amount of capital invested. By contrast, TPs which were created in 1994 or later showed a clear relationship between their date of inauguration and the amount of investment (the older the date the higher the investment).

It was interesting to find the majority (60%) of TPs which are located in Latin America in the "low" investment category.

1.3 Number of customers.3 Number of customers

As outlined in Chapter II (2.1), TP customers can be subscribers or non-subscribers. 2/3 of the TPs do have subscription services, with the number of subscribers ranging from 4 to 18,000, or on average (without the two high & low numbers) 144. The number of customers (non-subscribers) were estimated at 119 per month (average). Important is to recall that the majority of TPs (75%) find the development of their customer base either "satisfactory" or even "very satisfactory".

The information on the number of customers (subscribers as well as non-subscribers) was crosschecked with other variables and the following results were found:

There is a *strong* association between the number of subscribers and the BEP or, in other words, a larger number of subscribers accelerates the reach of self-sustainability. Furthermore, we could observe that those TPs which are most active in the ETO system (high number of ETOs sent) also have more customers and subscribers. There is a *relatively strong* association with the number of staff, the number of services offered, the trade facilitation level (or number of TP partners), and the level of investment. All these variables influence positively the number of TP subscribers. Little/*no* relationships

were found between the number of customers and the type of entity the TP constitutes (public or private).

In addition, a correlation was run testing the relationship between the number of subscribers and the age of the TP and a relatively high value resulted. By contrast, if we only look at the number of customers without the subscribers, no correlation results. Hence, the number of customers is not determined by the age of the TP. By contrast, it takes time to build up a subscriber base.

1.4 Trade matches and transactions carried out with the help of the Trade Points.4 Trade matches and transactions carried out with the help of the Trade Points

Bringing business partners together is a prerequisite for any (international) trade transaction. Finding a business partner has proved to be difficult for many small enterprises, especially in developing countries. TPs play a major role in addressing this problem. The survey revealed that "trade matching" is the number-one service of all TPs (88% of the TPs offer this service, see Chapter II, 1.10).

UNCTAD ETOs are the key source of information for the TPs' trade matching services. ETOs cover all countries, all products and all activities. Therefore, particular attention was given to the information obtained on the TPs' ETO activities.

First, the TP ETO-sending activity was examined and the following associations were found: a *strong* association exists with the number of staff, the type of entity (public and mixed entities send more than private entities), the amount of services offered, and the amount of capital invested. A *less strong* association was found with the level of trade facilitation services the TP offers. Generally, TPs sending more ETOs seem to be happier with the development of their customer base than others.

In addition, a series of correlations were tested and *strong* relationships found between the TPs sending many ETOs and those completing many transactions (see below), or those serving mainly large enterprises. A *relatively strong* correlation exists with the number of trade matches (see next paragraph), those serving many microenterprises, and those TPs which use E-mail as a frequent communication means. *Less* strong correlations were found with the age of the TP.

Besides the statistical tests employed on the ETO-sending activity, an attempt was made to better characterize two categories of TPs, namely TPs which send ETOs and TPs which do not. Results showed, for example, that TPs sending ETOs are those which have already reached BEP, offer more services, are all in the "high" trade facilitation group, use the Internet more actively and serve more medium- and large-sized companies. Those TPs not sending ETOs have the opposite features.

As mentioned in the previous Chapter, most TPs were not in a position to give precise information on the number of trade matches they complete, nor the number of transactions (and their values) they facilitate per month.

However, of those TPs which answered, a *strong* correlation could be found between those facilitating

many trade transactions and those completing many trade matches, being most active in the ETO system (i.e. sending and receiving many ETOs), as well as those counting with the largest number of customers and subscribers. In addition, a *relatively strong* correlation was found with the amount of services offered, the number of (part-time) staff, and those serving frequently small and medium-sized enterprises. *No* correlation could be found between TPs accounting for many trade transaction and their age.

Regarding the number of trade matches resulting from ETOs, again, those TPs which are most active in the ETO system (ETOs sent only) are also more successful in completing trade matches.

Based on this information, the following could be summarized with respect to the TPs' work in facilitating trade matches and trade transactions. First, trade matches largely result from information contained in UNCTAD ETOs. Second, those TPs which are most actively using the ETO system, and especially those sending ETOs, are more successful in helping their customers find trading partners and in facilitating trade transactions. These TPs also seem to be the ones which have more customers, offer a wider range of services (including trade facilitating services) and have larger staff.

2. Original model and Trade Point reality. Original model and Trade Point reality

This section examines to what extent TPs follow the original TP model/concept proposed by UNCTAD. To briefly recall the model, it encompasses several key elements: first, it proposes to gather all key players in international trade under one roof (physically or via electronic connections); hence, it calls for incorporating all entities involved in trade-related services - private as well as public - in a given location under the TP umbrella. Second, the three main functions of the TP are defined as (1) providing trade facilitation or trade transaction services, (2) providing trade information services, and (3) being a gateway to global electronic networks. Thereby, the main target group of the TPs are small and medium-sized companies which are perceived to need most help in accessing trade information, finding business partners, and completing trade transactions.

Based on this, the following questions are of particular importance for this report: how many TPs apply the original model and to what extent? What are the modifications implemented by TPs? Which strategies work best? Should the model be modified or made more flexible according to the TP reality?

In order to investigate these questions, the following information obtained from the survey was used in the analysis: the organizational set up of the TP (type of entity, TP partners); the services offered by TPs; the role electronic means play in the TP (use of E-mail, Internet services); and the endusers reached by the TP (according to size of enterprise and main activity).

2.1 Organizational set-up of Trade Points.1 Organizational set-up of Trade Points

The original model suggests that TPs should take advantage of and build upon already locally existing trade-related services. In other words, the TP should become a "one-stop-shop" bringing together local service providers - and not add "one more stop" for traders. Looking at the TPs, all but 4 followed this model; or, the large majority of TPs is in fact hosted by entities which already existed before.

Chapter II (1.3) described how many TPs have been set up as private, public or mixed entities. We found almost 2/3 in the "private" category, the remainder being split evenly between the "public" and "mixed"-entity category. Although the original model recommends mixed entities, it also emphasizes the role of the private sector in the TP management. Hence, we can safely say that most TPs have followed the original model in this aspect.

It was interesting to investigate more closely whether major differences could be identified between TPs being privately or publicly organized. The following associations were found between the type of entity and other variables: a *relatively strong* association exists with the number of staff (private and mixed entities have less full-time staff than public entities; no significant difference exists regarding other types of staff), the number of subscribers, the amount of services offered and the trade facilitation component (how many TP partners). In other words, private-sector TPs tend to be more active regarding the quality and quantity of their services and therefore have more customers. A *less strong* association was found with the BEP and with the satisfaction of the TP with its customer development. *No* associations were found between the type of entity and the amount of capital invested or new technology-driven services such as the production of Webpages for TP customers.

Another question in the questionnaire resulted in information on the participation of various service providers in the TP, including banks, transport companies, Customs, etc. Although most TPs collaborate on a contractual basis with one or several entities, the complete range of service providers is hardly represented in the TP set-up. Most common partners are banks, transport companies, foreign trade institutions and Chambers of Commerce. Results from Chapter II (1.7) show that only 1/3 of the TPs have followed the original model of bringing together all service providers. This may be explained by various factors:

- The heterogeneity of countries and the resulting distinct local conditions imply that some services are in higher demand than others (for example, transport services may already be well established in a given location and therefore not considered important to be included in the TP services);

- The time involved in bringing together a range of trade service providers is often long and implies costs. Not all institutions or companies are willing to work together under the umbrella of the TP. Although the TP concept requires to follow the principle of "non-monopolies", many private sector players prefer the opposite and are therefore not interested in participating in the TP association.

- The lack of resources in the UNCTAD Trade Point Programme prevents TPs from receiving more in-

depth assistance during their initial stage of setting up the TP and, particularly, its organizational framework. Ideally, for each new TP to be established, a feasibility mission would be carried out and the TP locally assisted in creating its institutional set-up.

Therefore, although most TPs are set up as associations or partnerships (as the original model suggests), not all entities suggested in the original model are members of the TP association.

For the analysis, it was assumed that those TPs having contractual agreements with one of the service providers also offer this service to their clients.

The statistical analysis demonstrated that the following measures of association exist: a *relatively strong* association between those having many partners (or trade facilitation services) and the number of subscribers, the number of services offered, the amount of investment in the TP, the number of ETOs sent and the type of entity (mixed entities are the ones with most partners); a *less strong* association with the BEP or the level of satisfaction with the customer development. Hence, it seems that offering trade facilitation services attracts more customers (especially subscribers) to the TP and has therefore a positive impact on the TP work. It also shows that a need for these kinds of services exists among local enterprises.

When looking at the data indicating the size of the enterprises served by the TPs, we found that those TPs serving on average more medium- and large-sized enterprises are also more represented in the "high" trade facilitation category (compare 2.3).

No correlation was found between the level of trade facilitation services and the number of staff or the age of the TP. However, when looking at the distribution of the data, we found that the majority of TPs which were created after 1994 showed "high" trade facilitation levels; by contrast, the majority of those created in 1994 or before fall into the "low" trade facilitation service category. This could reflect the increased emphasis of the UNCTAD TP Programme on establishing trade facilitation services in new TPs, after UNISTE.

2.2 Trade Point services.2 Trade Point services

According to UNCTAD's document "Criteria for the establishment and operation of Trade Points" (TD/B/EX(8)/L.4, June 1995), Trade Points are expected to offer the following services:

(a) Advisory services on internationally agreed recommendations on trade facilitation and better business practices; (b) Assistance in conducting import and export formalities; (c) Information on foreign trade regulations, both local and of trading partners; (d) Information on bodies that can give further assistance.

Furthermore, TPs are expected to provide:

(a) Electronic access to a wide range of market information; (b) A physical or virtual "one-stop" centre for trade related services, including Customs, import and export licences procedures, transport, banking and insurance etc.; (c) Assistance in the electronic connection of traders to the above mentioned services and advice on electronic trade.

The results from the survey show that the most common services offered are: matchmaking, follow-up on business and product information, transport consulting, and market research, followed by a range of other services (see Chapter II, 1.10). All of the services fall into one or another of the categories specified in the document mentioned above. The services which are of particular interest for this report are the ones related to points (b) of the text quoted: financial services (offered by 40% of the TPs), transport consulting (offered by 76%) and Customs clearance (offered by 44%).

Therefore, close attention was paid to those TPs offering one or several of these services and the following common characteristics were found:

Trade Points offering financial, transport or customs services to their clients reach break-even-point faster than others; they are among the older TPs and offer a larger variety of services; more of them are set up as public entities. Whereas they seem to have similar numbers of full-time staff, they clearly employ more staff on a casual basis than others (5.6 on average compared to 2.6 for all TPs). Furthermore, these TPs have more partners and more contractual agreements with other service providers than others.

No major differences were found regarding their level of satisfaction with the customer development, the number of customers, the size of the enterprises they serve, or the level of investment.

Looking at each of the services separately, we found that TPs offering transport services employ a high number of casual staff, are largely mixed entities, have higher amounts of investment, and have established contracts with transport companies.

Those offering financial services are the fastest to reach BEP (3 out of a total of 4 TPs having reached BEP by the time of the survey offer financial services), offer the largest number of trade facilitation services (as well as other services), employ a large number of staff on a casual basis, are usually not privately set up (but public or mixed), have high levels of investment, serve on average more larger enterprises, and have contractual agreements with more service providers than other TPs.

Finally, the TPs offering Customs services also reach BEP faster than the average, are among the oldest TPs, serve more microenterprises than the average TP, and have more contractual agreements with insurance providers and freight forwarders. On the other hand, their level of investment in the TP seems on average to be lower.

As described in Chapter II (1.10), TPs were classified into three categories according to the number of

different services they offer (many-some-few). This variable was crosschecked with several other variables and the following results were found: a *strong* association exists with the number of transactions carried out with the help of the TP and the number of ETOs sent per month. A *relatively strong* association was found with the type of entity (public and mixed entities offer more services), the number of TP staff, the number of customers and subscribers, the amount of investment, the role of trade facilitation/TP partners, and the level of satisfaction with the customer development.

In addition, relatively strong correlations were found with the number of transactions the TP facilitates per month, and the TPs serving largely small enterprises.

The test results suggest that all of these variables have an impact on the number of services the TPs offer. In addition, what had been previously found was that the number of TP services also influences positively the reach of BEP and the level of satisfaction with the customer development.

A *less strong* association was found with the age of the TP.

Among the services offered, of particular interest (besides the transaction services mentioned earlier) were services related to the use of new technologies, such as the production of Webpages for the TP customers (offered by 14 TPs or 56% of total). A closer look at this variable showed that those TPs which offer this service more frequently are also those investing more in the TP, or are those located in Asia/Pacific, the US or Europe (similar results were found regarding the use of E-mail for contacting the TP). Besides, they have a larger number of staff. This service seems to be independent from the type of entity of the TP (private or public).

Similarly, looking at the use of electronic tools in the TP, we examined to what extent associations could be found between those TPs using marketing on the Internet as one of their marketing instruments (13 TPs or 52% of total) and other aspects. Again, the amount of investment, the location of the TP (US, Europe - none of the ones located in Africa) and the number of its staff seem to play an important role here, whereas the type of entity seems less important (very low association). We also found that those TPs which use Internet as a marketing tool are also among the ones which have already reached BEP or are close to reaching it (relatively strong association).

2.3 Endusers - Trade Point customers.3 Endusers - Trade Point customers

At the heart of the TP programme is the objective to help less advantaged players, such as small- and medium- sized companies, to participate equally in international trade. Therefore the questions and responses related to the TP users are of particular importance.

As demonstrated in Chapter II (2.2), the large majority of the TP users are SMEs, and even microenterprises (31.5%). Hence, the main target group of the programme is clearly met through the TP network.

Besides the size of the enterprises, it seemed interesting to find out more about the characteristics of the TP clients. For example, who do they trade with? What do they trade? Are they producers, wholesalers, or retailers? Do TPs reach intermediaries or endusers? And, what can we find out about

the work characteristics of certain TPs serving certain types of enterprises?

As explained in the previous chapter (2.2), the information obtained on the size of the enterprises of the TP clients is based on estimates by the TPs on the relative importance of micro, small, medium, or large-sized enterprises using their services. Hence, as a result, we obtained for each TP a percentage number corresponding to the frequency with which different-sized enterprises use the TP. Based on this, only a limited number of statistical tests were applied, such as the correlation procedure in order to identify certain relationships between the size of the enterprises using the TP and other variables.

Where no correlations could be applied, and in order to get a better picture of the TPs serving mainly micro, small, medium or large businesses, we selected those TPs which (a) serve on average more microbusinesses than others (>32% of clientele), (b) serve on average more micro and small businesses (>64% combined), (c) serve on average more medium and large businesses (>37% combined), and (d) serve on average more large businesses than other TPs (>14.6%). For (a) 13 cases resulted, for (b) 14 cases, for (c) 10 cases, and for (d) 8 cases. Then, a large number of variables were selected and the distribution of their values among the different groups compared.

The following was found:

a) Micro and small enterprisesa) Micro and small enterprises

Results from correlation tests showed that microenterprises seem to be largely producers (and less wholesalers) and that TPs serving these clients are less active in terms of sending ETOs (*relatively strong* correlation). Small enterprises are served by TPs offering many services and using fax for communicating with the TP (*relatively strong* correlation).

Results from selecting those TPs serving mainly micro and small businesses and comparing them to those serving mainly medium and large businesses are the following:

TPs serving mainly micro and small businesses are above average located in Latin America and Africa, are among the older TPs, and are more involved in local and continental trade. They employ less full-time and more part-time staff, invest less in the TP and work more on a personal basis with their customers (only valid for those TPs serving microbusinesses), hence E-mail is used less. These TP have more customers than those working more with larger companies; their customers are above average producers or retailers involved in activities which belong to the secondary sector. TPs serving mainly micro and small businesses expect to need longer to reach BEP than those serving mainly large businesses.

We also examined the types of services offered mainly by these TPs and found that they offer above average "follow-up" services, translation services, market research, and help with completing contracts. On the other hand, services offered below average include the issuing of trade certificates and training.

b) Medium and large enterprisesb) Medium and large enterprises

The results from the correlations show that, like the previous group, TPs serving many large enterprises, show high values with respect to their ETO activity (sent, received), the type of activitiy of the client (less producers) or the use of E-mail to contact the TP.

As in the previous section (on micro and small businesses), we then distinguished all TPs serving above average large companies and those serving above average large and medium-sized companies combined from the previous group. The following observations can be made:

No significant values were foung with respect to medium-sized enterprises.

TPs serving more large enterprises are more satisfied with the development of their customer base than those serving more microenterprises; they are less located in Latin America, but more in Asia. TPs serving both medium and large businesses invest more in their TPs, employ more full-time and less part-time staff and have less customers. Their clients contact them more via E-mail and less in person. These are also younger TPs reaching BEP faster than others. Their customers are more wholesalers (especially of medium-sized companies) and less producers or retailers and trade more on a global and less on a local level.

Comparing the types of services with those of the previous group, TPs serving largely medium and large companies offer more training, issuing of trade certificates, and transport consulting. The latter two are only valid for those serving above average large enterprises. On the other hand, services less offered include "follow-up", market research, translation services, helping with contracts and "others".

3. Trade flows supported by Trade Points3. Trade flows supported by Trade Points

Finally, we examined more closely the types of geographic trade flows TPs are involved in. Information on this resulted from the questions on the location of the TPs and the location of the TPs' clients' business partners. As mentioned in Chapter I, the majority of the TPs considered in this survey are located in Latin America. Hence, the cases referring to the other continents and presented in the following, are relatively few and therefore provide only limited value for interpretation. On the other hand, some of the TPs located outside Latin America have very high numbers of customers and therefore their information can be compared to those from others regions.

a) TPs located in **Africaa) TPs located in Africa** reported their customers' direction of trade flows in the following order: 1. global, 2. local, 3. national and 4. continental. Compared to the whole group, these businesses trade more at the local and global level, and less at the continental level. At the global level, the order of importance is 1. Europe, 2. North America, 3. Asia/Pacific, 4. Africa, and 5. Latin America. Compared to the average of all TPs, they trade more with Africa, Asia and Europe, and less with Latin and North America.

b) TPs located in **Asiab) TPs located in Asia** serve customers trading at the 1. global, 2. continental, 3. national, and 4. local level. Compared to the overall TP group, their customers trade more on the global and less on the local and continental level. At the global level, their preferences are 1. Europe, 2. North America, 3. Asia/Pacific, 4. Africa, and 5. Latin America. This corresponds to a higher value for Europe and Asia and a very low value for Latin America.

c) **European** TPsc) **European** TPs serve customers involved in 1. national, 2. continental, 3. local, and 4. global trade. This reflects higher values at the national level, and lower values at the global level, compared to the whole group. At the global level, the following order was given: 1. Europe, 2. North America, 3. Asia/Pacific, 4. Latin America, and 5. Africa. These numbers reflect higher values for Europe, and lower values for Latin America and Africa than the average TP.

d) **Latin American** TPs'd) **Latin American** TPs' customers trade at the 1. continental, 2. local, 3. global, and 4. national level, with above-average values for the continental and local levels, and below-average values for the global level. At the global level, their trade flows are with 1. Latin America, 2. North America, 3. Europe, 4. Asia/Pacific, and 5. Africa. This corresponds to higher values for Latin America, and lower values for Europe and Africa.

e) Finally, regarding TPs located in the **United StatesTPs located in the United States**, trade flows at the geographical levels are, in order of importance: 1. global, 2. continental, 3. national, and 4. local. Compared to all TPs, this reflects higher values for the global and national level, and lower values for the local and continental level. At the global level, trade flows are with 1. Asia, Europe, Latin America, North America (equal importance), followed by 2. Africa. Compared to all TPs, the values for Asia and Africa are higher, for all others lower.

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Chapter IV: Summary and conclusions

This report outlined the main results obtained from a survey of 25 operational Trade Points. Whereas

Chapter II described the main characteristics of the Trade Points' work and clients, Chapter III provided results from statistical analyses identifying the relationships between distinct characteristics (or variables) and their interpretation. In this chapter, the main outcomes will be summarized and conclusions drawn.

For this, it is important to recall the main objectives of the survey and the questions posed initially:

1) How are Trade Points organized and managed and how well are they doing?

2) Who are the Trade Point customers or endusers?

3) To what extent do Trade Points apply the original model proposed by UNCTAD?

Information providing answers to these questions has been offered in detail in the preceding chapters. In the following, results related to questions 1) and 2) will be summarized. Conclusions drawn from these results will be provided in the final section addressing question 3).

1. How are Trade Points organized and managed and how well are they doing? 1. How are Trade Points organized and managed and how well are they doing?

To summarize the previous results analyzing various indicators for the success of the TP work, the following can be pointed out.

a) Most TPs are set up as private entities hosted by a local institution, and they have contractual agreements with several partners who participate in the TPs' organizational framework. Most common partners are banks, transport companies, foreign trade institutes and Chambers of Commerce.

b) The amount of capital invested in the TP since its beginning differs considerably, with 40% of TPs having invested US$ 10-50,000, 20% US$ 50-100,000, and 40% above US$ 100,000. No relationships were found between the amount of capital invested in the TP and the type of entity it constitutes or how many partners it has. The lowest amounts of capital invested were found among the oldest Trade Points.

c) By the time of the survey, 16% of the TPs had already reached and 48% were expecting to reach financial break-even within one year.

d) Those TPs which are older and those which are closer to reaching financial self-sustainibility are also more satisfied with the evolution of their customer base.

e) Most common services offered by TPs are "matchmaking" and "follow-up" on company and product information, followed by "consulting on transport matters" and "market research".

f) The quality and quantity of the Trade Point services, the amount of investment, as well as the number of subscribers of a TP, all influence the time when it will reach financial break-even.

g) TPs encounter difficulties giving precise information on the number of transactions they are involved in. Of those who could provide information, the average number of transactions per month was 18.

h) Most TPs (72%) receive and send ETOs. The number of ETOs sent varies between 1 and 20 per day. An active involvement in the ETO system by the TPs (receive, send, trade matches) seem to influence positively their number of customers and subscribers. These TPs do also more actively use the Internet to promote their services or their clients' services, are involved in facilitating higher number of trade transactions, and offer a broader range of trade facilitation services than other TPs. In addition, those TPs sending more ETOs are also those with higher rates of reaching self-sustainability soon.

To summarize, the number of subscribers, the range and type of services (especially transaction services) and the amount of capital invested in the TP seem to be the key variables determining successful operations of the TPs and their ability to reach financial self-sustainability. On the other hand, a less important role appears to be played by the age of the TP, the number of staff, or which type of entity it is (public, private, or mixed).

2. Who are the Trade Point customers or endusers?. Who are the Trade Point customers or endusers?

In terms of the main characteristics of the TP clients, the following should be noted:

a) The average number of customers per TP is 119 per month; the average number of subscribers is 144 per TP. 76% of the TPs do have subscribers. The majority of TPs (75%) are satisfied or even "very" satisfied with the evolution of their number of customers (including subscribers) since the beginning.

b) The large majority of the Trade Point customers are SMEs and microenterprises (together 85.7%).

c) Clients come from all economic sectors, with a slight majority from the production sector. Similarly, the majority of TP users are involved in secondary sector activities (e.g. industry and manufacturing of all kinds).

d) The most common means of communication between TP and customer are fax, telephone and personal contact. E-mail is used by 15.6% of the customers which is considerably high given that the large majority of TPs are located in developing countries.

e) Most TP customers are involved in continental trade, closely followed by global and local trade. At the global level, trade flow directions are, in order of importance, Europe, North America, Latin America and Caribbean, Asia and Pacific, and Africa. These numbers vary according to the location of the Trade Points.

f) TPs serving above average micro and small enterprises do also expect to need more time to become financially self-sustaining and do emphasize different types of services (e.g. follow-up on business contacts, help to complete contracts) compared to the whole group.

g) TPs serving above average medium and large-sized enterprises participate more actively in the ETO system and use E-mail more frequently to communicate with their clients than other TPs. In particular, those TPs serving above average large enterprises do also reach financial break-even faster, are younger, and seem to be more satisfied with the evolution of their customer base. Their services focus less on contracts or "follow-up" activities, but rather on training or the issuing of trade certificates.

3.To what extent do Trade Points apply the original model proposed by UNCTAD?.To what extent do Trade Points apply the original model proposed by UNCTAD?

The original model was recalled in Chapter III (2.). The following results related to this question can be summarized:

a) *Public-private-sector partnershipsa) Public-private-sector partnerships*

The majority of TPs are hosted by local entities, involve the private sector, and form partnerships with local trade facilitation providers. 40% of the TPs also involve the public sector.

b) *Diversity of services (one-stop shop)b) Diversity of services (one-stop shop)*

Those TPs offering more trade facilitation services (compared to the whole group) are mixed (private/public) entities, have more customers or are younger. Many of them were created after UNISTE (held in October 1994) which resulted in a stronger emphasis on trade facilitation services from UNCTAD's Trade Point programme.

TPs having contractual arrangements with service providers in the financial, transport and Customs sector, are above average mixed or public entities, reach financial break-even faster, or are found among the older TPs. Especially those who work with financial services are also the fastest to reach break-even. Those who offer Custom's services are among the oldest TPs and serve above average microenterprises.

c) *Use of advanced technologiesc) Use of advanced technologies*

New information technologies are more frequently applied by TPs located in developed countries. These include the use of E-mail for communicating with the TP customer, or the use of the Internet to promote the TP services or to offer Internet-based services to TP clients. The type of entity plays no role in this aspect. These TPs are also closer to reach financial break-even than others.

d) *Promotion of SMEsd) Promotion of SMEs*

As mentioned before, the large majority of TP customers are micro, small, and medium-sized enterprises; however, almost 15% of the TP clients also come from enterprises above 500 employees. Usually, TPs offer a broad range of services attractive to all kinds of enterprises; some do, however, specialize in services addressed to different-sized (smaller or larger) enterprises.

Although the majority of the TP customers are involved in international trade (53%), national and local trade (together 47%) is almost as important.

Given the information obtained from the survey, the following conclusions can be drawn regarding the questions whether and to what extent TPs follow the original Trade Point model developed and promoted by UNCTAD.

What can be positively confirmed is that, first, TPs are generally formed as partnerships between various service providers and Trade Points overall do better if they have more partners than less. Second, the private sector is heavily involved in the TP operations. Third, Trade Points offer a wide range of services as suggested in the original model. Fourth, the main target group or TP clientele are small enterprises. And fifth, Trade Points do take advantage of the services offered through the GTPNet including access to a large number of partners (i.e. other TPs) around the world and the technical services provided by the network.

Nevertheless, the survey also revealed that certain components of the Trade Point set-up and their work do not correspond completely to the proposed concept and that certain adjustments need to be implemented. For example, the types of services TPs offer need to correspond to the local demand and therefore a careful needs analysis has to be carried out by new Trade Points before starting their operations. Especially, the types of services which correspond most to the needs of small enterprises should be designed more carefully.

Second, the involvement of the private sector needs to be more emphasized in the guidelines provided by UNCTAD.

Third, the use of electronic tools in the TP work needs more emphasis; although many TPs use the network in one way or another, those taking fully advantage of it (including the use of ETOs, the marketing on the Internet, the providing of Internet services to their customers) also benefit.

This, however, requires higher amounts of investment in the TP. The survey showed that, in general, those TPs investing more capital in their TP do much better since they are able to develop more and better quality services which, in turn, attract more customers. As it had been mentioned in several parts of the report, the age of the TP plays only a secondary role when it comes to evaluating the success of the TPs. Hence, new TPs with a well-designed business strategy and the necessary start-up capital (provided by the TP partners) have a good chance to become financially self-sufficient within a reasonable time period of two years or less.

ANNEXESANNEXES

ANNEX I: Results from the statistical tests

Explanation of the displayed values

The objective of the tests carried out was to identify relationships between certain variables and by which factors the variables are determined. Therefore, a dependent and an independent variable were defined. The tests measure the influence of the variables listed in the tables on the variable heading the table.

The following values are displayed:

a) For *nominal variables*:

Cramer's V (chi-square-based measure, for any table size)

Contingency Coefficient C (chi-square-based measure, can generally not attain maximum value of 1; a maximum value can be calculated exactly only for square tables and a corrected C-value has to be calculated (displayed in the table under "CC"). For non-square tables, the maximum value can only be estimated and therefore no corrected C-value can be calculated; in that case, the C-values are marked with a star (*) in the table.)

Lambda (PRE-measure, displayed for the prediction of the dependent variable)

b) For *ordinal variables*:

Cramer's V

Contingency Coefficient C

Gamma (PRE-measure, for any table size, very sensitive to "corner-correlations")

Tau-b (PRE-measure, only applicable for square tables)

Tau-c (PRE-measure, for any table size, more difficult to interpret than tau-b)

c) For *ratio and interval variables:*

Correlation Coefficient r (examines *linear* relationships only)

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1. Customer development (dependent variable)

Variable	V	C	Gamma/Lambda	Tau
Break- even- point	0.51	0.58*	gamma=0.40	tau-c=0.31
Investment	0.29	0.37 CC=0.46	gamma=-0.52	tau-b=-0.35
Full-time staff	0.37	0.47*	gamma=-0.35	tau-c=-0.25
Part-time staff	0.36	0.45*	gamma=-0.08	tau-c=-0.05
Other staff	0.23	0.31*	gamma=-0.26	tau-c=-0.15
Level of services	0.37	0.47 CC=0.57	gamma=0.35	tau-b=0.22
Date of inauguration	0.32	0.41*	gamma=0.36	tau-c=0.27
Trade facilitation level	0.32	0.41 CC=0.50	gamma=-0.16	tau-b=-0.10
Entity	0.32	0.42 CC=0.51	lambda=0.08	

ETOs sent	0.62	0.66*	gamma=-0.18	tau-c=-0.15

-

2. Break-even-point (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**Tau**	**r**
Customer development	0.51	0.58*	gamma=0.40	tau-c=0.31	
Investment	0.48	0.56*	gamma=-0.48	tau-c=-0.38	0.48
Date of inauguration	0.57	0.70*	gamma=0.52	tau-c=0.42	
Number of customers	0.42	0.51*	gamma=-0.01	tau-c=-0.01	0.39
Number of subscribers	0.48	0.69 CC=0.78	gamma=-0.17	tau-b=-0.14	0.22
Full-time staff	0.57	0.70*	gamma= -0.48	tau-c=-0.37	0.59
Part-time staff	0.45	0.61*	gamma=0.32	tau-c=0.23	0.35
Other staff	0.45	0.62*	gamma=0.43	tau-c=0.29	
Level of services	0.41	0.50*	gamma=0.16	tau-c=0.11	0.13

Trade facilitation level	0.34	0.43*	gamma=-0.03	tau-c=-0.02	0.12
Entity	0.33	0.43*	lambda=0.04		
Transactions	0.79	0.85*	gamma=0.09	Tau-c=-0.05	-0.05

3. Investment (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**Tau**	**r**
Entity	0.20	0.27 CC=0.33	lambda=0.07		
Trade facilitation level	0.26	0.35 CC=0.42	gamma=-0.48	tau-b=-0.32	0.34
Date of inauguration	0.50	0.58*	gamma=0.01	tau-c=0.01	
TP-location (continent)	0.44	0.53*	lambda=0.40		
Producer					0.27
Retailer					-0.27
Wholesaler					-0.10
Other type					0.12

Primary activity					0.15
Secondary activity					0.10
Tertiary activity					-0.21

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4. Number of customers (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**Tau**	**r**
Marketing on the Internet	0.32	0.31*	lambda=0		
Entity	0.29	0.38 CC=0.46	lambda=0.18		
Trade facilitation level	0.25	0.33 CC=0.40	gamma=-0.12	tau-b=-0.08	0.17
Full-time staff	0.31	0.40*	gamma=0.13	tau-c=0.10	0.62
Part-time staff	0.51	0.58*	gamma=0.74	tau-c=0.50	0.90
Other staff	0.43	0.52*	gamma=0.08	tau-c=0.05	0.05

Level of services	0.36	0.45 CC=0.55	gamma=-0.72	tau-b=-0.46	0.16
Investment	0.29	0.38 CC=0.47	gamma=0.52	tau-b=0.35	0.30
Break-even- point	0.42	0.51*	gamma=-0.01	tau-c=-0.01	0.39
Date of inauguration	0.14	0.20*	gamma=-0.03	tau-c=-0.03	
Microenterprises					0.08
Small enterprises					0.18
Medium enterprises					-0.16
Large enterprises					-0.04

5. Number of subscribers (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**Tau**	**r**
Entity	0.40	0.49*	lambda=0.13		
Level of Trade Facilitation	0.44	0.53*	gamma=-0.11	tau-c=-0.08	0.30

Full-time staff	0.47	0.63*	gamma=0.20	tau-c=0.15	0.23
Part-time staff	0.48	0.69 CC=0.78	gamma=-0.23	tau-b=-0.17	0.07
Other staff	0.46	0.62*	gamma=-0.46	tau-c=-0.33	-0.26
Investment	0.54	0.61*	gamma=0.21	tau-c=0.17	0.30
Break-even- point	0.48	0.69 CC=0.78	gamma=-0.17	tau-b=-0.14	0.22
Level of services	0.58	0.63*	gamma=-0.02	tau-c=-0.01	0.02
TP-age					0.45
Date of inauguration	0.48	0.64*	gamma=-0.12	tau-c=-0.09	
Microenterprises					-0.12
Small enterprises					-0.26
Medium enterprises					-0.13
Large enterprises					0.38

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6. Level of Trade Facilitation (dependent variable)

Variable	V	C	Gamma/Lambda	Tau	r
Entity	0.50	0.58 CC=0.71	lambda=0.31		
Investment	0.26	0.35 CC=0.42	gamma=-0.48	tau-b=-0.32	0.34
TP-age					0.21
Date of inauguration	0.29	0.38*	gamma=-0.33	tau-c=-0.24	
Full-time staff					0.25
Part-time staff					0.23
Other staff					0.18
Microenterprises					-0.01
Small enterprises					-0.32
Medium enterprises					0.17
Large entprises					0.03

Transactions					0.48
ETO-transactions					0.48
TP-age					0.31

7. Level of services (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**Tau**	**r**
Entity	0.42	0.51 CC=0.62	lambda=0.09		
Level of Trade Facilitation	0.31	0.41 CC=0.50	gamma=0.51	tau-b=0.32	0.34
Full-time staff	0.37	0.47*	gamma=-0.32	tau-c=-0.21	0.20
Part-time staff	0.21	0.29*	gamma=0.02	tau-c=0.01	-0.03
Other staff	0.57	0.63*	gamma=-0.35	tau-c=-0.22	0.47
Investment	0.35	0.44 CC=0.54	gamma=-0.66	tau-b=-0.43	0.47

Customer development	0.37	0.47 CC=0.57	gamma=0.35	tau-b=0.22	
Transactions	0.71	0.71*	gamma=-0.67	tau-c=-0.50	0.59
TP-age					0.35
Date of inauguration	0.32	0.42*	gamma=0.10	tau-c=0.07	
Number of customers	0.36	0.45 CC=0.55	gamma=-0.72	tau-b=-0.46	0.16
Number of subscribers	0.58	0.63*	gamma=-0.02	tau-c=-0.41	0.02
Microenterprises					0.10
Small enterprises					-0.48
Medium enterprises					0.15
Large enterprises					0.05

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8. Marketing on the Internet (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**

TP-location (continent)	0.37	0.34	lambda=0.13
Investment	0.58	0.50*	lambda=0.44
Entity	0.27	0.26*	lambda=0.11
Full-time staff	0.35	0.33*	lambda=0.11
Part-time staff	0.26	0.26*	lambda=0
Date of inauguration	0.51	0.46*	lambda=0.33

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9. Production of Homepages (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**
TP-location(continent)	0.48	0.43*	lambda=0.27
Investment	0.45	0.41*	lambda=0.20
Entity	0.26	0.25*	lambda=0.09

Full-time staff	0.43	0.40*	lambda=0.27
Part-time staff	0.34	0.32*	lambda=0.18
Date of inauguration	0.12	0.12*	lambda=0

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10. ETOs sent (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**Tau**	**r**
TP location (continent)	0.72	0.82*	lambda=0.17		
Investment	0.64	0.67*	gamma=0.45	tau-c=0.34	0.36
Entity	0.63	0.67*	lambda=0.08		
Full-time staff	0.68	0.76*			0.11
Part-time staff	0.67	0.76*			0.02
Date of inauguration	0.64	0.74*	gamma=0.04	tau-c=0.03	
Level of trade facilitation	0.64	0.67*	gamma=-0.05	tau-c=-0.04	0.23

Level of services	0.86	0.77*	gamma=-0.41	tau-c=-0.31	0.51
Number of customers	0.75	0.73*			0.07
Number of subscribers	0.62	0.78*			0.14
Marketing (Internet)	0.55	0.48*	lambda=0.08		
Break-even-point					0.17
Transactions					0.67
E-mail					0.43
ETO-transactions					0.65

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11. Number of full-time staff (dependent variable)

Variable	**V**	**C**	**Gamma/Lambda**	**r**
Entity	0.51	0.58*	lambda=0.13	
Investment				0.54

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12. Number of part-time staff (dependent variable)

Variable	V	C	Gamma/Lambda	r
Entity	0.43	0.52*	lambda=0.07	
Investment				0.26

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13. Number of other staff (dependent variable)

Variable	V	C	Gamma/Lambda	r
Entity	0.41	0.50*	lambda=0.15	

Investment				0.16

-

14. Additional *correlations* using size of enterprises

Variable	Micro-enterprises	Small enterprises	Medium enterprises	Large enterprises
1. Type of communication				
Fax	0.10	0.49	0.05	-0.39
E-mail	-0.11	-0.22	-0.50	0.61
Personal contact	0.14	-0.10	0.06	-0.13
Regular mail	-0.22	-0.15	0.26	0.08
Telephone	0.03	-0.03	0.29	-0.24
2. Branch				
Producer	0.47	0.19	-0.06	-0.46
Retailer	0.18	0.21	-0.19	-0.12

Wholesaler	-0.37	0.11	0.23	0.08
Other branches	-0.28	-0.46	0.07	0.43
3. ETO-activity				
ETOs sent	-0.47	-0.79	-0.13	0.79
ETO trade matches	0.12	-0.64	0.11	-0.66
ETO- transactions	-0.01	-0.51	-0.63	0.45
4. Transactions	-0.40	-0.63	-0.51	0.68

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15. Additional *correlations* using "transactions"

Variable	
Trade matches	-0.55
ETOs sent	0.67
ETOs received	0.49

Number of customers	0.58
Number of subscribers	1.00
Full-time staff	0.29
Part-time staff	0.91
TP-age	-0.32

ANNEX II: Tables to Chapter III (2.3): Size of enterprises

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The objective of this analysis was to reveal differences between certain variables among Trade Points serving different-sized enterprises. The following methodology was applied:

1. Trade Points which serve "above average" (i.e. more than other TPs) *microenterprises* were selected. Considered were those TPs for which micros account for more than 32% of their clients. 13 cases were listed.

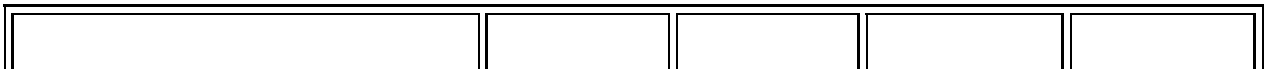
2. Trade Points which serve "above average" *micro- and small enterprises* were selected. Considered were those TPs for which both groups account for more than 64 %. 14 cases were listed, not all of which were identical with those listed under 1.

3. Trade Points which serve "above average" *large enterprises* were selected. Considered were those TPs for which large enterprises account for more than 14.6 %. 8 cases were listed.

4. Trade Points which serve "above average" *medium-sized and large enterprises* were selected. Considered were those TPs for which both groups account for more than 37 %. 10 cases were listed, not all of which were identical with those listed under 3.

Then, for the different groups, the following frequencies were listed:

- Level of customer satisfaction
- Number of TP services
- Break-even-point
- Investment
- Activity of the enterprises (primary, secondary, tertiary)
- Branch of the enterprises (producer, retailer, wholesaler, others)
- Type of communication used (e-mail, fax, personal appearance, telephone, regular mail, telex)
- Geographical level of trade (local, national, continental, global)
- Global trade by continents
- Number of staff (full-time, part-time, other)
- TP age
- Date of inauguration
- Types of services
- Level of trade facilitation services



SIZE OF ENTERPRISE / VARIABLE	Micro enter-prises	Micro- & small enter-prises	Medium & large enter-prises	Large enter-prises
CUSTOMER DEVELOPMENT (%)				
very satisfactory	30.8	30.8	20.0	37.5
satisfactory	38.5	46.2	50.0	50.0
not satisfactory	30.8	23.1	30.0	12.5
NUMBER OF TP SERVICES (%)				
many	15.4	21.4	30.0	25.0
some	69.2	57.1	50.0	62.5
few	15.4	21.4	20.0	12.5
BREAK-EVEN-POINT (%)				
already reached	0.0	0.0	40.0	37.5
within the next six month	8.3	7.7	20.0	25.0
within the next year	50.0	53.8	10.0	25.0
within the next two years	33.3	30.8	20.0	0.0
more than two years	8.3	7.7	10.0	12.5
INVESTMENT (%)				
low	53.8	57.1	20.0	25.0
medium	30.8	21.4	20.0	0.0
high	15.4	21.4	60.0	75.0
ACTIVITY OF TP CLIENTS (%)				
Primary Sector	24.2	22.3	25.2	22.1

Secondary Sector	43.5	45.0	39.8	44.4
Tertiary Sector	32.2	32.8	35.1	33.5
BRANCH OF TP CLIENTS (%) Producers	32.7	32.3	28.5	26.1
Wholesalers	25.7	27.3	31.8	29.5
Retailers	23.0	24.0	17.4	20.9
Other type	18.5	16.3	22.2	23.5
COMMUNICATION BETWEEN TP AND CLIENTS (%) E-mail	13.4	14.9	15.1	20.9
Fax	26.3	27.5	26.6	26.7
Personal contact	28.3	25.1	21.1	18.3
Telephone	25.7	24.8	28.0	24.4
Post	6.3	6.8	8.8	9.1
Telex	0.0	0.9	0.5	0.6
GEOGRAPHICAL LEVEL OF				

TRADE (%) Local trade	26.8	27.8	22.1	18.8
National trade	17.5	18.8	19.0	17.5
Continental trade	30.3	29.5	25.9	29.0
Global trade	25.4	23.3	32.9	34.8
GLOBAL TRADING PARTNERS (%) Africa	9.4	10.7	5.8	7.0
Asia/Pacific	14.5	14.4	19.6	17.7
Latin America	25.4	25.4	23.2	19.6
North America	25.3	24.1	25.6	27.9
Europe	25.4	25.3	25.8	27.7
NUMBER OF STAFF Full-time staff	6.8	6.4	8.0	8.9
Part-time staff	5.8	5.7	3.9	3.6
Other staff	3.4	5.5	3.7	4.0
TP AGE (month)	23.1	21.2	14.6	16.0

INAUGURATION (%)				
before 1994	38.5	35.7	10.0	12.5
1994	15.4	14.3	30.0	50.0
1995	38.5	35.7	30.0	12.5
1-6 1996	7.7	14.3	30.0	25.0
SERVICES OFFERED (%)				
Trade Certificates	7.7	14.3	40.0	50.0
Matchmaking	84.6	85.7	100.0	87.5
Follow-up on information	92.3	85.7	90.0	75.0
Meeting facilitation	46.2	50.0	50.0	50.0
Market research	76.9	78.0	70.0	62.5
Translation services	76.9	78.6	40.0	50.0
Training	15.4	21.4	30.0	50.0
Preparation of contracts	53.8	50.0	40.0	37.5
EDI clearing house	23.1	21.4	20.0	12.5
Production of home pages	53.8	50.0	60.0	50.0
Financial services	38.5	42.9	40.0	37.5

TRADE FACILITATION LEVEL (%)				
high	23.1	21.4	60.0	50.0
medium	23.1	21.4	10.0	0.0
low	53.8	57.1	30.0	50.0

ANNEX III: Questionnaire sent via E-mai in June 1996

Q1: What is the name of the TP?

Name:

Q2: When was the TP inaugurated? Please mark your answer with an X!

1 Before January 1994

2 Between January and December 1994

3 Between January and July 1995

4 Between August and December 1995

5 Between January and May 1996

Q3: Is the TP a private, a public or a mixed private and public entity? Please mark the correct answer with an X!

1 Private entity

2 Public entity

3 Mixed private and public entity

Q4: How does the TP collaborate with the following entities? Please mark the correct answer with an X!

1 Banks contractual basis non-contractual basis never

2 Transport companies contractual basis non-contractual basis never

3 Insurance companies contractual basis non-contractual basis never

4 Freight forwarder contractual basis non-contractual basis never

5 Chambers of commerce contractual basis non-contractual basis never

6 Foreign trade institutes contractual basis non-contractual basis never

7 Customs contractual basis non-contractual basis never

8 Others, please specify: contractual basis non-contractual basis never

Q5: How much staff does the TP have (including paid or not-paid staff and staff paid by third parties)?

1 Number of part-time staff is .

2 Number of full-time staff is .

3 Others (e. g. consultants, students etc.) Please specify type and number:

Q6: What was the approximate overall net investment in the TP until today in US$? Please mark your answer with an X!

1 Up to 1 000 US$

2 1 000 to 10 000 US$

3 10 000 to 50 000 US$

4 50 000 to 100 000 US$

5 More than 100 000 US$

Q7: When will the TP approximately reach break-even-point? Please mark your answer with an X!

1 Already reached

2 Within the next six months

3 Within the next year

4 Within the next two years

5 In more than two years

Q8: Which of the following marketing measurements have been undertaken to promote the TP? Please mark your answer with an X (multiple answers possible)!

1 Reports in newspaper/radio/TV

2 Advertisement in newspaper/radio/TV

3 Direct marketing for the local businesses by phone, fax, post or E-mail

4 Contacting the businesses in person

5 Organization of special events, e. g. seminars, small trade fairs, etc.

6 Marketing on the Internet, e.g. link placing, participation in news groups, etc.

7 Others, please specify:

8 None

Q9: Which of the following services does the TP offer to the customers? Please mark your answer with an X (multiple answers possible)!

1 Issuing of trade certificates

2 Matchmaking services for customers

3 Follow-up on company and product information

4 Provision of facilities to have business meetings, conferences, etc.

5 Market research

6 Translation services

7 Training courses for customers in e. g. accounting, computers, etc.

8 Preparation of business letters, contracts, etc.

9 Function as an EDI clearing house

10 Production of home pages, multimedia catalogues, etc.

11 Direct assistance in financial services (e. g. export credit, export insurance, etc.)

12 Consulting in transport matters

13 Customs clearance

14 Others, please specify:

Q10: How many subscribers does the TP approximately have presently?

1 No subscribers

2 The number of subscribers is about .

Q11: Approximately how many customers (excluding subscribers) does the TP have in an average month?

About customers.

Q12: How did the number of customers develop since the inauguration of the TP? Please mark your answer with an X!

1 Very satisfactory

2 Satisfactory

3 Not satisfactory

Q13: According to your knowledge, how many transactions are carried out in an average month with the help of the TP?

1 Don't know

2 Approximately transactions.

Q14: According to your knowledge, what is the approximate value of transactions carried out with the help of the TP in US$?

1 Don't know.

2 About US$.

Q15: On which of the following issues does your TP collaborate with other TPs? Please mark your answer with an X (multiple answers possible)!

1 Information requests

2 Follow-ups on business and product information

3 Technical and logistical issues

Q16: How many ETOs does the TP receive and send on an average day?

1 The TP does not offer ETOs

2 Received ETOs:

3 Sent ETOs:

Q17: How many trade matches between businesses result from ETOs in an average month?

1 Don't know.

2 About trade matches.

Q18: How many transactions between businesses result from ETOs in an average month?

1 Don't know.

2 About transactions.

PLEASE NOTE THAT FOR THE FOLLOWING QUESTIONS THE SCALE RANGES FROM 0 TO 10:

10 equals: it happens very frequently

5 equals: it happens at an average frequency

0 equals: it never happens at all.

Q19: According to number of employees, which enterprises use the TP services? Please mark your answers with an X before the number!

1 Microenterprises (1 to 10 employees)

10 9 8 7 6 5 4 3 2 1 0

2 Small enterprises (10 to 50 employees)

10 9 8 7 6 5 4 3 2 1 0

3 Medium enterprises (50 to 500 employees)

10 9 8 7 6 5 4 3 2 1 0

4 Large enterprises (more than 500 employees)

10 9 8 7 6 5 4 3 2 1 0

Q20: According to type, which enterprises use the TP services? Please mark your answers with an X!

1 Producers

10 9 8 7 6 5 4 3 2 1 0

2 Wholesalers

10 9 8 7 6 5 4 3 2 1 0

3 Retailers

10 9 8 7 6 5 4 3 2 1 0

5 Others, please specify:

10 9 8 7 6 5 4 3 2 1 0

Q21: According to economic activity, which enterprises use the TP services? Please mark your answers with an X!

1 Primary activity (e.g. agriculture, fishing, mining etc.)

10 9 8 7 6 5 4 3 2 1 0

2 Secondary activity (processing of all kinds, e.g. manufacturers, industry, etc.)

10 9 8 7 6 5 4 3 2 1 0

3 Tertiary activity (services of all kinds, e.g tourism, consultancies etc.)

10 9 8 7 6 5 4 3 2 1 0

Q22: What sort of communication do the customers use to keep in contact with the TP? Please mark your answers with an X!

1 Personal appearance at the TP

10 9 8 7 6 5 4 3 2 1 0

2 Regular post

10 9 8 7 6 5 4 3 2 1 0

3 Telephone

10 9 8 7 6 5 4 3 2 1 0

4 Telex

10 9 8 7 6 5 4 3 2 1 0

5 Fax

10 9 8 7 6 5 4 3 2 1 0

6 E-mail

10 9 8 7 6 5 4 3 2 1 0

Q23: Where are the trading partners of your TP-customers located? Please mark your answers with an X!

1 At the local level

10 9 8 7 6 5 4 3 2 1 0

2 At the national level

10 9 8 7 6 5 4 3 2 1 0

3 At the continental level

10 9 8 7 6 5 4 3 2 1 0

4 At the global level

10 9 8 7 6 5 4 3 2 1 0

If at the global level, please specify the regions!

1 Africa

10 9 8 7 6 5 4 3 2 1 0

2 Asia/Pacific

10 9 8 7 6 5 4 3 2 1 0

3 Europe

10 9 8 7 6 5 4 3 2 1 0

4 North America

10 9 8 7 6 5 4 3 2 1 0

5 Latin America and Caribbean

10 9 8 7 6 5 4 3 2 1 0

At last we would kindly request that you write any comments or suggestions you have concerning this survey:

THANK YOU VERY MUCH FOR YOUR TIME AND ATTENTION.