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EXPORT SERVICES  
*for Small- and Medium-Sized*  
ENTERPRISES



*Report on*

Canadian Bilateral  
Business Associations

May 2000



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# TABLE OF CONTENTS

Foreward .....1

## Executive Summary

Objectives of Survey .....2

Summary of Findings .....4

Recommendations .....8

Practical Frame of Reference for Trade Commissioners .....11

## Research Findings

Overview of Bilateral Business Associations .....12

Financial Profile .....14

Membership Profile .....17

Profile of Mandate: Activities, Objectives and Services .....22

Logistical Profile .....32

Relations with DFAIT and Other Government Services .....34

Acknowledgments .....40

## Appendices

1. List of Bilateral Business Associations .....41

2. Detailed Research Methodology .....44

3. Constraints Faced by Bilateral Business Associations .....49

4. Issues of Common Interest .....52

5. Survey and Letter .....57

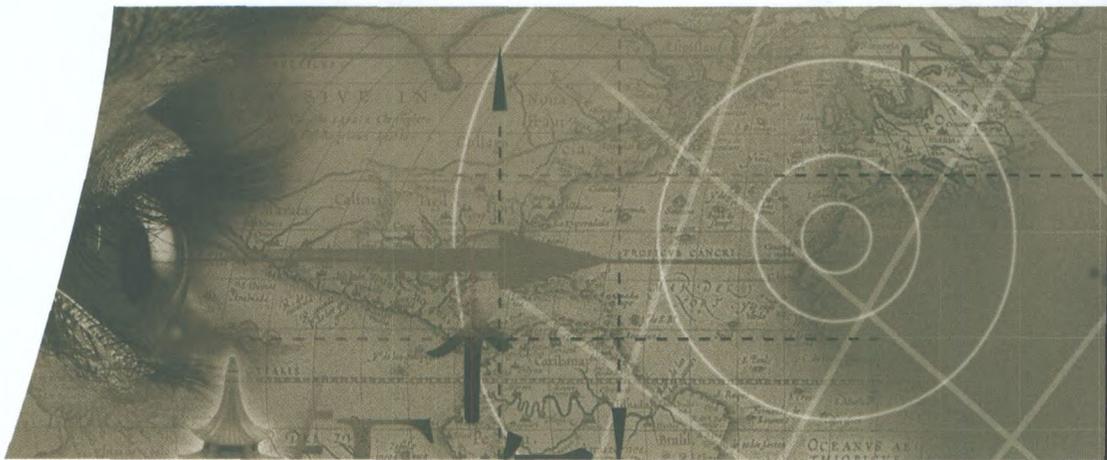
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## FOREWORD

The Export Services for Small- and Medium-Sized Enterprises Division of the Department of Foreign Affairs and International Trade (DFAIT) is pleased to present the first detailed survey of bilateral business associations in Canada.

The survey, designed to be used by the associations and by employees of DFAIT, provides a collective view of associations' activities, modes of operation and vision of their future. The recommendations in the report are supported by a quantitative analysis of the associations, a summary of the constraints faced by associations, a description of the research methodology including a copy of the research tools and a list of issues of common interest that DFAIT could discuss with the associations.

This survey reflects the Department's interest in the work being accomplished by Canada's bilateral business associations. The Department trusts that this document will provide a reference tool for the development of export opportunities for Canadian firms.



## EXECUTIVE SUMMARY

### *Objectives of Survey*

The Department of Foreign Affairs and International Trade (also referred to in this document as "The Department," or "DFAIT") is seeking to improve the outreach of its export programs and services among Canadian business people by working with intermediary groups and organizations and notably bilateral business associations. The Department of Foreign Affairs and International Trade and the many bilateral business associations in Canada have a common goal: both promote the sale of Canada's goods and services to foreign markets and both target the same exporters as members and beneficiaries of services. The first step was to learn more about bilateral business associations, their members, their international business development strategies and their interest in cooperation with DFAIT.

For the purposes of this survey, a bilateral business association is an organization:

- one of whose main activities is trade promotion and development for Canadians who export and do business abroad;
- whose promotional activities centre on one country or region; and
- that answers first and foremost to its members.

Note:

- None of these criteria excludes organizations that also promote imports and foreign investment in Canada.
- The term "bilateral business association" includes chambers of commerce, business and trade councils, business or business people's forums and other designations used to identify an organization corresponding to the above definition.



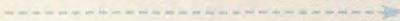
The bilateral business associations are a significant player in the field of international trade. They are growing in number and membership has increased 298 percent since 1990. The current 19,334 members are a source, relatively untapped by the Department, of information, knowledge and networking potential. The Department's knowledge of bilateral business associations, previous to the undertaking of this survey, was limited to its experience with only a few bilateral associations and the varied experiences of a small number of trade commissioners. The objective of this survey is to define areas of interest shared by the associations and the Department that can guide the Department in its future cooperation with bilateral business associations.

By means of a survey sent to each association, requesting quantitative data about their operations and members, the Department researched the following:

1. What size are the associations, what do they do and what challenges do they face?
2. How actively do the associations promote international trade and business ties?
3. On what common issues might the associations and the Department work together?

Of the 83 surveys sent out 48 were completed and returned, a response rate of 58 percent of the total number of bilateral business associations. Details of the research process are shown in Appendix 2: "Detailed Research Methodology."

## *Summary of Findings*



### **Viability of Bilateral Business Associations as Promoters of International Trade**

#### **Profile of the associations and their members**

Respondants to the survey indicate that their membership has reached over 19,000 Canadian business people active or interested in the export market. This 1999 figure is up more than 200 percent from that of 1995. The increasing demand for services indicates that the associations are fulfilling a role that business people value and, more importantly, that responds to their needs.

A snapshot of Canada's bilateral business associations reveals that:

- 46 percent have between one and six full-time staff and four percent have more than 10 employees;
- 90 percent have a Web site or a newsletter or both;
- 90 percent of members are based in Central or Western Canada;
- 26.3 percent of members export services, 21 percent export products and services, and 22.3 percent export products; and
- 80 percent are national associations.

Member companies vary in size:

- 51 percent of member companies have annual sales of under \$5 million;
- 27 percent of member companies have annual sales of between \$5 and 50 million; and
- 20 percent of member companies have annual sales of over \$50 million.

#### **Profile of mandates and activities**

- *The common mandate* of all bilateral trade associations is to promote international trade between Canada and a particular country or region.
- *The common needs* of all members are networking and access to information on trade activities in a particular national market or region.
- *The common services* offered by all associations are those that facilitate networking and the circulation of information on imports and exports.

The associations' four most significant activities, in order of importance, are:

- hosting meetings and networking opportunities;
- distributing information;
- forging links and matching; and
- providing other networking services e.g. seminars, luncheons featuring prominent speakers.

The associations' four top objectives for the next two years, in order of importance, are:

- increasing their number of members and amount of funding;
- promoting, networking and communicating;
- upgrading existing services; and
- developing new services.

The five main export challenges that association members face, in order of importance, are:

- accessing markets and understanding trade rules and regulations;
- increasing their knowledge of their market;
- working in the business environment: banking systems, bureaucracies and political risk factors;
- obtaining funding; and
- becoming more familiar with export techniques and member company infrastructure.

## **Associations' sustainability**

Approximately 25 percent of the associations have been in existence for more than 30 years. It can therefore be concluded that the challenges mentioned above can be overcome and that these associations can make use of existing practices in order to remain viable and sustainable.<sup>1</sup>

The survey indicated 81 percent of the associations had stable revenue or increased their revenues over the last three years. Bilateral business associations in Canada have annual budgets ranging from \$6,000 to over \$100,000. Nineteen percent have annual revenues of more than \$100,000. Membership fees remain the most important source of revenue for associations. As membership fluctuates, so does the associations' overall revenues. Less than 20 percent of bilateral business associations receive external (e.g. government) financial support.

## **Assess the Associations' Relationship with Canada's Multicultural Communities**

No conclusion was drawn on this issue because too few associations answered the questions that asked them to profile their members. This, among other findings, indicates that the association executives could become more knowledgeable about their membership.

## **Common Issues that the Associations and the Department Could Work on Together**

### **Potential for cooperation between associations and the Department**

Analysis of the associations' revenues, number of members, core services, number of employees and number and extent of specific services, indicates that 76 percent of the associations are considered to be capable of working more closely with the Department without compromising their mandates and structure.<sup>2</sup>

Between 70 percent and 80 percent of the associations stated, without reservations, that they were ready to work more closely with the Department.

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<sup>1</sup> In fact, 81 percent of the associations, representing all income levels more or less equally, maintained or increased their budgets over the last three years.

<sup>2</sup> Within this group, six percent of the associations are strong in the areas of financial profile, numbers of members and services delivered. Eleven percent of the associations have large budgets yet are low on member numbers and activities. Fifty-nine percent of the associations have room to increase their financial profile, membership and services.

## Potential benefits of cooperation

For Associations:

- the additional revenues to be received from shared activities and contracts;
- the experience and skills to be gained by the associations;
- greater visibility for the associations; and
- greater credibility for the associations in the eyes of the business community.

For the Department:

- greater circulation of information between the Department and business people; and
- shared responsibility for the organization of events.

Through cooperation, associations can hope to increase, in order of importance:

- the quality of the business and political contacts they can provide;
- the extent to which their operational methods suit the needs of businesses;
- the quality of their services; and
- their membership.

The associations would be prepared to work with the Department in these four activities:

- trade and ministerial missions;
- trade fairs and catalogues;
- networking and twinning; and
- conducting market studies.

## *Recommendations*



### **1. Expand Contact with Business People**

Through enhanced cooperation with bilateral business associations, the Department can increase the promotion of its services and programs to the business community. Some 90 percent of the associations produce a newsletter or a Web site or both. Seventy percent publish their newsletters at least quarterly and 95 percent update their Web sites at least monthly. Almost all regularly hold events such as seminars to keep their members informed. The Department can offer to link its Web site to those of the associations and to provide content for their newsletters and information to share at their meetings or seminars.

### **2. Use DFAIT Communication Channels to Heighten Associations' Visibility**

The bilateral business associations face a constant challenge to increase their membership and their visibility. The Department could help the associations raise their profile in the business community by:

- **A Web page linked to the Department's site**  
A Web page<sup>3</sup> linked to the Department's Web site, could list the bilateral business associations, including two-to-four-line profiles and links to each association Web site.
- **A new section in WIN Exports**  
WIN Exports' current range of categories does not include a list of bilateral business associations. DFAIT could create a Bilateral Business Association Directory similar to the Aboriginal and women's business directories.
- **A Roadmap to Exporting: Guide to Government Services**  
In "Roadmap to Exporting: Guide to Government Services" the Department should include the name "bilateral business associations"<sup>4</sup>. DFAIT could ensure that bilateral business associations with Web sites feature a link to an electronic version of the Roadmap.
- **The *CanadExport* newsletter**  
Association profiles could be published in this newsletter.

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<sup>3</sup> A Web page, not a Web site.

<sup>4</sup> This recommendation was implemented in October, 1999.

### **3. Include Association Profiles in "Strategis"**

Strategis, an extensive Web site managed by Industry Canada, is one of the primary sources of information for Canada's business community. Most bilateral business associations are not yet listed in Strategis. Associations should forward information and request that Industry Canada include a directory of associations in the Strategis database.

### **4. Encourage Inter-Association Contacts**

Trade, sectoral, bilateral associations would benefit from contact and potential cooperation and communication among themselves.

### **5. Propose that Associations Research their Membership Profiles**

It is apparent that the bilateral business associations have not collected detailed information about the businesses of their members. Data would benefit the associations, particularly in the targeting of their services. The parties to the survey could offer to cooperate on a joint survey development that associations would use separately to canvass their members.

### **6. Look into Representation of the Business Community in the Atlantic Provinces**

Firms based in the Atlantic provinces are significantly under-represented in associations' memberships. The associations should determine if the interests of firms in this Canadian region are being served, and if so, by whom. If they are not being served how can this be changed.

### **7. Funding from International Organizations**

Some associations have already obtained funding from international organizations. It would be profitable for associations to consider the circumstances in which cooperation with international organizations are viable.

## **8. Frame of Reference for Trade Commissioners**

The information presented in this report provides trade commissioners with concrete reference points regarding the export services capacity they can expect bilateral business associations to possess. This collective information should be combined with success stories to generate fruitful operating models and parameters for cooperation between associations and the Department.

## **9. Distribution of Survey**

The distribution list for this survey should include the other federal departments and agencies that deal with the export interest of businesses, DFAIT regional offices and missions abroad and relevant ministries of provincial governments. Two copies should be sent to each of the bilateral business associations that were surveyed in the research phase of the report.

## **10. Meeting with the Bilateral Business Associations**

DFAIT and the survey respondents should convene a meeting to review the findings and recommendations. The agenda would include the matters presented in Appendix 4: "Issues of Common Interest."

## *Practical Frame of Reference for Trade Commissioners*

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To be able to work effectively with bilateral business associations, the Department will benefit from collective data on the associations: their limitations and the circumstances and mechanisms that enable these groups to survive and grow. With this knowledge, the Department will be able to help the associations overcome their obstacles and become effective partners in the fostering of international trade.

Because of the increasing demands on trade commissioners - the link between the Department, the associations and business people looking for information - the Department acted to identify potential new partners. Due to the cultural composition and specific geographical focus, bilateral business associations offer significant potential to be solid partners in the development of international business opportunities. This report offers a better understanding of bilateral business associations and trade commissioners can use this information to accelerate cooperation with associations.

Although the use of "best practices" (i.e., an "ideal" to aim for) has proven worthy in other circumstances, in the case of the associations, this tool raises a sensitive problem of ethics and the confidentiality of strategic information in a competitive setting. Best practices are the fruit of an organization's efforts to grow, and they are an appreciable asset in a competitive situation. For this reason, the report does not expand on this specific issue but rather provides collective data that can guide trade commissioners.

Based on data provided in this report, the association, its membership and the specific export market, the trade commissioner will be able to develop minimum levels of performance an association needs to demonstrate in order to partner with the Department.

## RESEARCH FINDINGS

### *Overview of Bilateral Business Associations*

#### Number of Bilateral Business Associations in Canada

- There are 87 bilateral business associations in Canada.

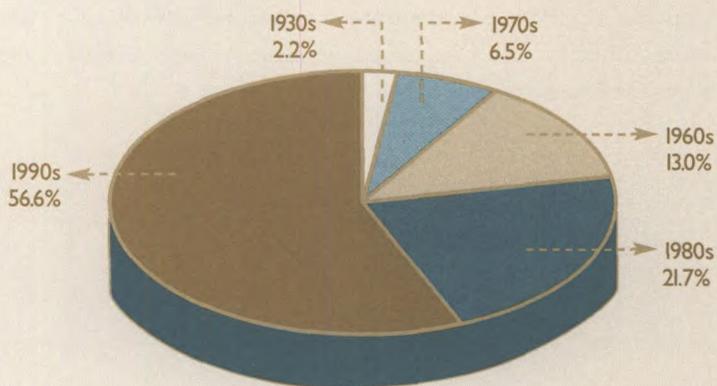
#### Creation of Associations

- Some of Canada's bilateral business associations have been active since 1934.
- In every year since 1987, at least two new bilateral business associations have been founded.
- The number of associations increased by nearly 300 percent between 1990 and 1999.

#### Lifespan of Associations

- On average, at least one association ceases operations every year.
- About 25 percent of the associations are over 30 years old.

Distribution of association by year of creation



## Legal Status of Associations

- 81 percent are federally or provincially incorporated.
- 72 percent are non-profit organizations.

## Communication Tools

### Newsletters and Web sites

- 71 percent publish a newsletter.
- 54 percent have a Web site.
- 90 percent have a Web site or a newsletter or both.
- 70 percent publish their newsletter at least once a quarter.
- 95 percent update their Web site at least once a quarter.

### Directory of members

- 90 percent publish a directory of their members.

### Others

- 12 percent publish market intelligence reports.



## *Financial Profile*

### **I. Revenues**

#### **Range of revenues**

- Bilateral business associations in Canada have annual budgets ranging from \$6,000 to over \$100,000.

#### **Distribution of associations according to their revenues**

- 19.4 percent have annual revenue of more than \$100,000.
- 11.1 percent have annual revenue of more than \$50,000.
- 69.4 percent have annual revenue of less than \$50,000.

**Distribution of association by revenue**



## Most common sources of revenue, in declining order

### In brief

- Membership dues are the most common source of revenue for the associations in general.
- The maximum number of sources of revenue used by an association is eight.
- Indications are that the combination of revenue sources varies considerably from one association to another.

### The numbers

Sources of Revenue for	Used by % of Associations
<b>Membership dues</b>	<b>96.8 %</b>
Sale of services	21.8 %
Sale of publications	18.7 %
Missions sponsored by DFAIT	15.6 %
Financial support from a provincial government	12.5 %
Sponsorships	9.3 %
Sale of products (other than publications)	9.3 %
Seminars, meetings, conferences, lunches and social activities	9.3 %
Other	6.25 %
Financial support from CIDA (not core)	6.25 %
Organization of trade fairs sponsored by DFAIT	6.25 %
Organization of trade fairs not sponsored by DFAIT	6.25 %
A foreign government	6.25 %
Financial support from other government agencies	3 %
Financial support from international organizations	3 %
Investment	3 %
Core funding from DFAIT	0 %

### **Increases/decreases in revenue over the last three years**

- 81 percent of the associations had stable revenue or increased their revenue over the last three years.

### **The numbers**

28 percent had an *increase* in revenues

53 percent had no *change* in revenues

9 percent had a *decrease* in revenues

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100 percent

## **2. External Financial Support**

### **Percentage of associations receiving external financial support**

- 18.8 percent of the associations receive external financial support.

### **Sources of external financial support being received when the study was conducted, for any type of project**

- 31 percent private sector
- 25 percent international organizations
- 25 percent Canadian government
- 19 percent provincial governments

## **3. Role of Funding**

The data do not permit conclusions on the role of funding. With few exceptions, revenue percentages from outside funding are minimal in association budgets. However, it is possible that funding received in the past has helped some associations become established, since 100 percent of the associations with budgets exceeding \$100,000 have received funding from one of the five sources cited in the survey.<sup>5</sup> This survey was not intended to determine the co-relationship between funding and growth of associations. It is interesting to note that only 50 percent of associations with budgets exceeding \$25,000 have received funding from the cited sources. Only 43 percent of the group with budgets under \$25,000 has received funding. (DFAIT has a policy of not providing core funding to business associations.)

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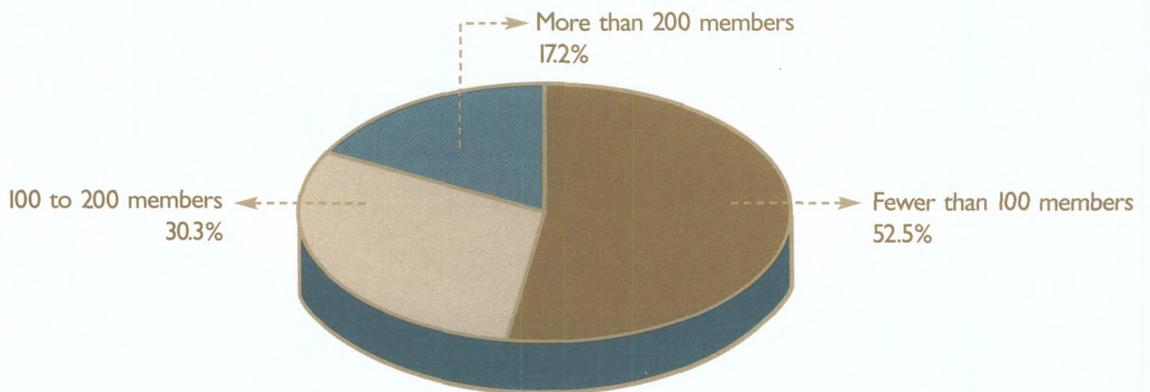
<sup>5</sup> The five sources mentioned in the study are: the private sector; provincial governments, the Canadian International Development Agency (CIDA), the Department of Foreign Affairs and International Trade (DFAIT) and the federal government (outside CIDA and DFAIT).

## *Membership Profile*

### **I. Number of Members per Association**

The associations have between 3 and 1,800 members.

#### **Distribution of associations by membership in 1999**



### **2. Total Number of Members (estimated) for Bilateral Business Associations in Canada**

The number of businesses belonging to bilateral business associations in Canada increased 73% from 1990 to 1995 and increased a total of 298% between 1990 and 1999.

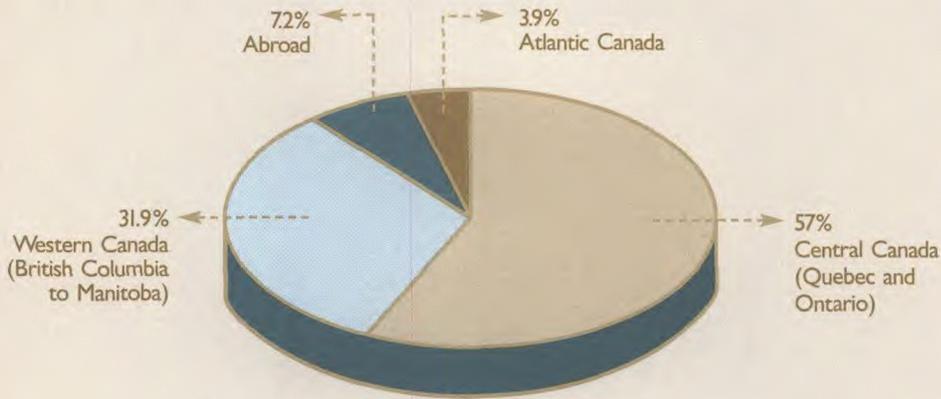
#### **Total number of association's members (approximate), during the following years**

Year	1999	1995	1990
Members	19,334	7,404	4,860

### 3. Regional Distribution of Membership

Nearly 90 percent of association members are located in Central Canada (Ontario and Quebec) or Western Canada (British Columbia to Manitoba); the Atlantic provinces are under-represented.

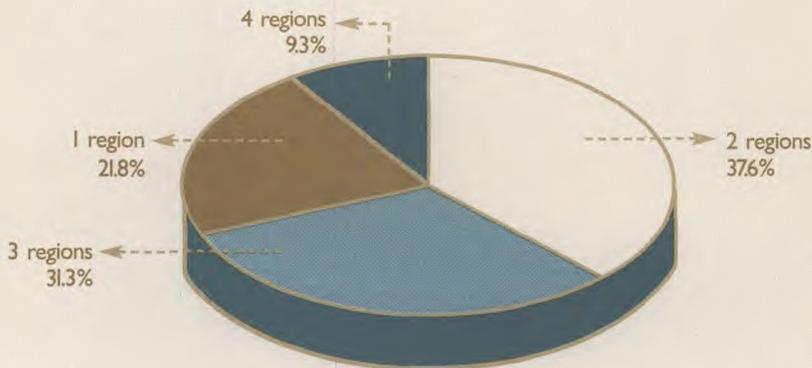
**Distribution of members by region**



### 4. Geographic Scope of Associations

- Nearly 80 percent of bilateral business associations are national-level organizations, with members in more than one of Canada's major regions.
- Membership is geographically contiguous. For example, there is no association that has members in the West and the Atlantic provinces but not in Central Canada.

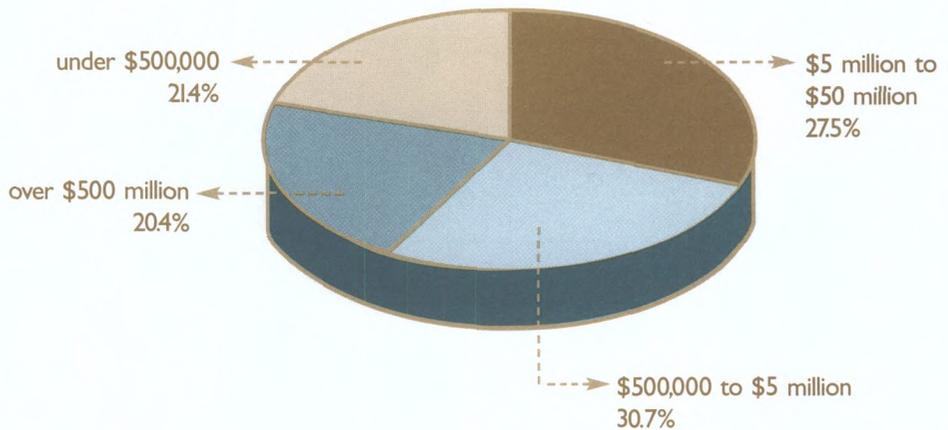
**Distribution of association by a number of regions in which members are located**



## 5. Size of Associations' Company Members

- Over 75 percent of associations represent companies from all revenue levels ("revenue bands"), from \$500,000 to over \$50 million.
- Member companies are distributed fairly equally among all the revenue bands.

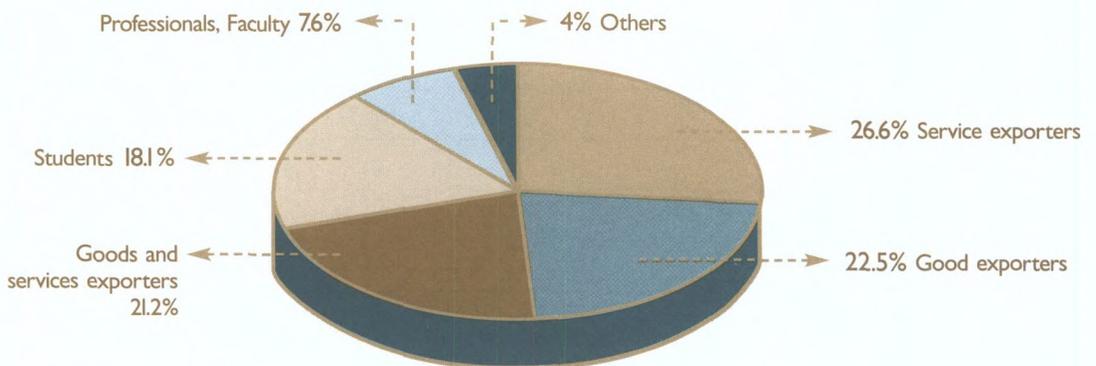
**Distribution of members by revenue band**



## 6. Goods and Services Providers

The membership of the associations is evenly divided between goods providers and service providers.

**Distribution of members by type of business**



## 7. Representation of Sectors

### In brief

- Nearly 80 percent of the bilateral business associations in Canada each represent more than nine economic sectors.

### The numbers

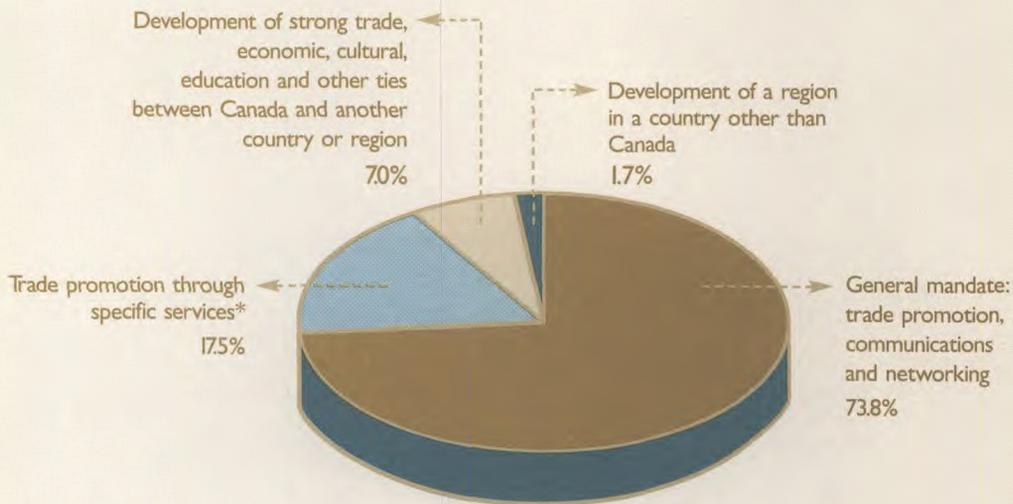
Economic Sectors	Percentage of Associations that Represent the Sector
Consulting services	4.0 %
Banks and financial institutions	3.9 %
Agriculture and agri-food	3.6 %
Engineering	3.6 %
Information technology	3.6 %
Legal services	3.6 %
High technology	3.5 %
Telecommunications	3.5 %
Construction	3.2 %
Financial services	3.2 %
Building materials	3.1 %
Wholesale trade	3.0 %
Investment	2.9 %
Mining, petroleum, oil and gas	2.8 %
Education and training	2.6 %
Energy	2.6 %
Housing	2.6 %
Tourism	2.6 %
Manufacturing and chemical	2.5 %
Medical/biotechnology	2.5 %
Project management	2.5 %

Continued on next page.

Economic Sectors	Percentage of Associations that Represent the Sector
Communications and information	2.4 %
Environment	2.4 %
Real estate, rental and leasing	2.4 %
Service industry	2.4 %
Transport and warehousing	2.4 %
Accommodation and food services	2.2 %
Natural resources	2.2 %
Forestry	1.9 %
Government services	1.9 %
Fisheries, coastal resources and marine	1.8 %
Retail trade	1.8 %
Waste management and remediation	1.7 %
Entertainment and recreation	1.3 %
Health care and social services	1.3 %
Publishing	1.3 %
Public administration	1.2 %
Arts and culture	1.2 %
Utilities	0.9 %
Radio broadcasting	0.9 %
Other	0.6 %
<b>TOTAL</b>	<b>99.6 %</b>

## *Profile of Mandate: Activities, Objectives and Services*

### **I. Mandate**

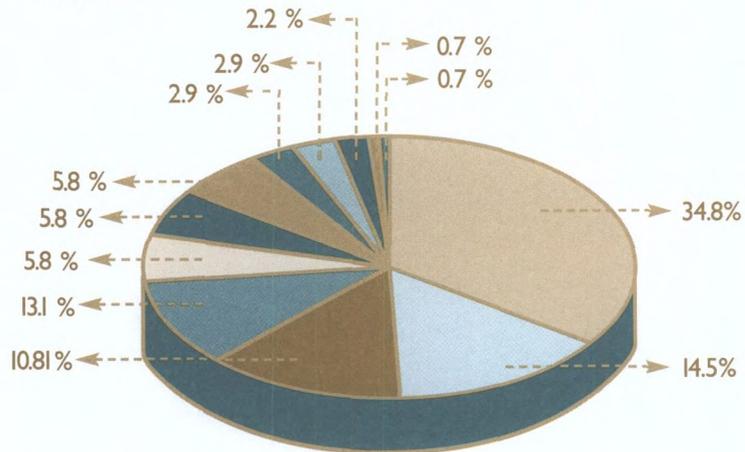


\* Trade promotion through specific services:

- Advice
- Assistance in organizing trade events— fairs, missions, etc.
- Support for seminars and meetings for members
- Role in relations between the Government of Canada and a foreign government
- Trade services not covered by the Government of Canada

## 2. Main Activities

The numbers



- Meetings\* (34,8%)
- Information gathering and dissemination\*\* (14,5%)
- Matching and linkage (10,8%)
- Other networking services (13,1%)
- Consulting and support services relating to general or technical trade matters (5,8%)
- Field Activities\*\*\* (5,8%)
- Market Promotion\*\*\*\* (5,8%)
- Other services\*\*\*\*\* (2,9%)
- Advocacy and advice to governments (2,9%)
- Participation in annual trade events - summits, international markets and so on (2,2%)
- Participation in or organization of trade fairs (0,7%)
- Local department; development of a region overseas (0,7%)

- \* **Meetings:** conferences, seminars, luncheons, annual conferences, VIP round tables, symposiums, workshops, annual general meetings, etc.
- \*\* **Information gathering and dissemination:** Web site search and maintenance, newsletters, reports
- \*\*\* **Field activities:** trade missions, business trips and industrial tours
- \*\*\*\* **Market promotion:** of the foreign market in Canada and the Canadian market overseas
- \*\*\*\*\* **Other services:** translation, seeking new members, importing and exporting goods and services, etc.

## **The descriptions**

### **Networking**

Organization of seminars, workshops, business lunches, social events, etc.

### **Promotional Activities**

Hosting of foreign trade delegations and organization of joint bilateral events, annual multilateral events, receptions, the arrival of delegations, programs of activities, meetings, panel discussions and other similar functions.

### **Events Abroad**

Organization of trade fairs, trade missions, industrial visits, field trips for business programs or mission heads, business trips etc.

### **Specific Information on**

#### ***Companies***

Investigation of companies' credibility and offering of recommendations on foreign companies.

#### ***Business Climate***

Provision of technical information and advice on import–export rules and regulations, and offering of consulting services on specific issues.

#### ***The Market***

Provision of specific market intelligence, market diagnoses etc.

#### ***Potential Partners***

Identification of potential partners, support of matchmaking, and putting companies in touch to promote partnerships.

#### ***Potential Contracts***

Seeking out of contracts for Canadian companies.

#### ***Key Contacts***

Provision of access for their members to key political and business contacts in Canada and the target region(s).

### **Negotiation**

Organization of trade negotiations with target partners.

### **Advocacy**

Advocacy, on behalf of their members, with Canadian and foreign governments.

### Representation

Representation of Canadian companies at trade fairs.

### Technical Support

Provision of technical support for business start-ups.

### Local Premises for Members

Provision of local office support to members.

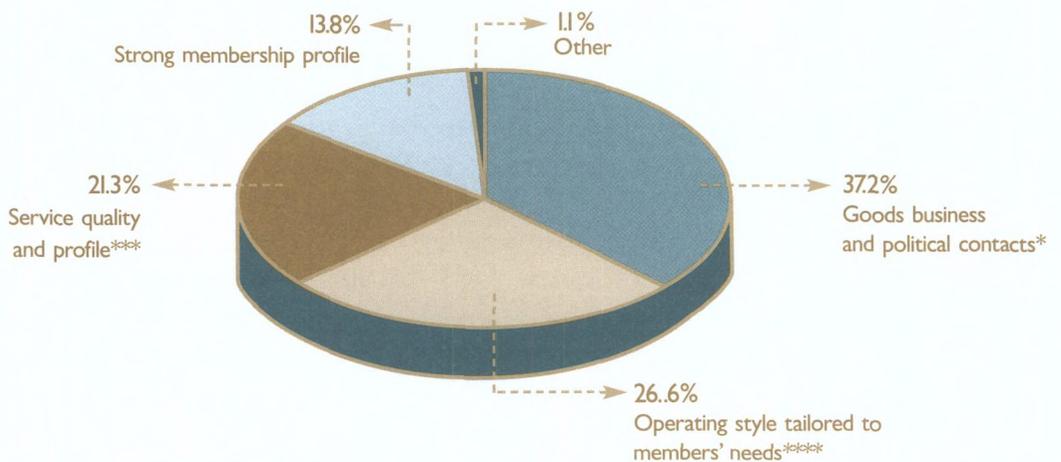
### Translation

Translation services available to members.

### Communication

Production of a newsletter, Web site or both.

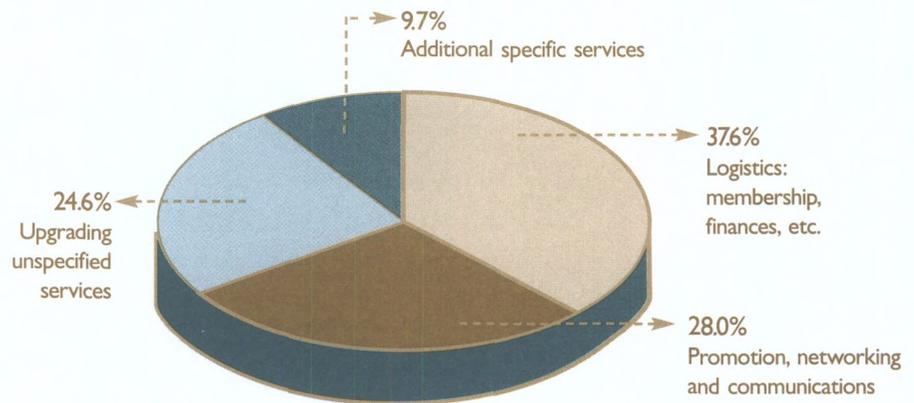
## 3. Main Competitive Advantages



- \* **Quality of contacts** (37.2 percent)
  - 25.5 % Special status in wide-area networks and/or quality networks
  - 11.7 % Source of key contacts in Canadian or target-country government or both
  
- \*\* **Quality of membership** (13.8 percent)
  - 8.5 % Membership profile
  - 5.3 % Expertise of directors in trade and/or in target market
  
- \*\*\* **Quality of activities** (21.3 percent)
  - 17.1 % Specific activities, such as:
    - Database on companies in target market
    - Trade assistance services
    - Extensive resources in Canada and in target market
    - Examination of credibility of foreign companies
    - Matching services
    - Translation and interpretation services
    - Multilateral advocacy services
    - Miscellaneous (see translation)
  - 4.2 % Activities to promote Canadian companies in target market
  
- \*\*\*\* **Operating Procedure** (26.6 percent)
  - 5.3 % Flexible and non-bureaucratic partnership
  - 3.2 % Focus on specific country
  - 6.0 % Small cost of membership and use of services (better suited to limitations of small- and medium-sized businesses)
  - 2.1 % Profile overseas
  - 10.0 % Miscellaneous
    - Direct contact with clients
    - Well-defined priorities
    - Recognized by foreign and Canadian government
    - No political affiliation, or independent

#### 4. Associations' Main Objectives for the Next Two Years

- At least 65.6% percent of the associations intend to focus on logistics (i.e., financing, organization, management, recruitment of new members promotion, communications) and basic services over the next two years.
- Only a few associations are working on plans to introduce or upgrade additional specific services.



## **5. Priority Activities: Listed in Order from the Most Common to the Least Common**

### **Recruitment of new members**

The priority shared by all the associations, regardless of their size, is the recruitment of new members. To do so, approximately 63 percent of the associations are considering conducting a special recruiting drive.

### **Logistics**

Associations want to reposition themselves, improve their services, find new revenue sources, etc.

### **Basic activities**

Basic activities rank third: general meetings, dissemination of information, conventions, seminars, etc.

### **Some specific activities**

Approximately 63 percent of the associations consider additional specific activities a priority: matchmaking, organization of missions, participation in or recruiting for missions, and diplomatic activities to complement government efforts.

### **Other specific activities**

Approximately 50 percent of the associations consider other additional specific activities a priority: lobbying, participation in trade fairs, foreign market intelligence reports, training, giving advice to DFAIT, etc.

### **Foreign activities**

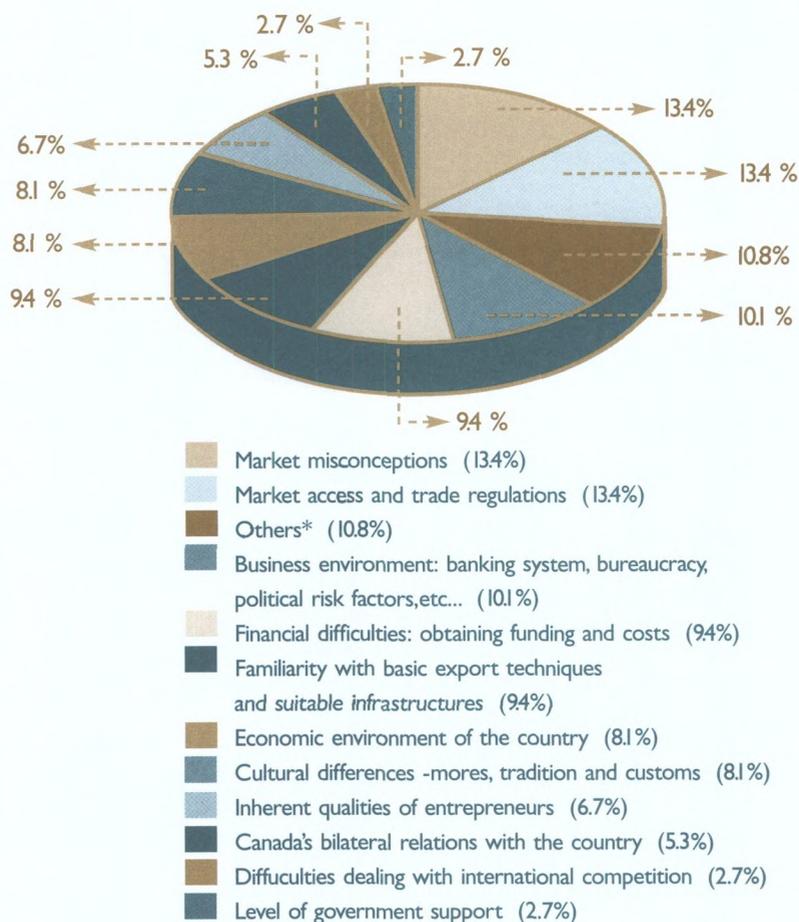
A smaller group of associations, about 40 percent, are involved in foreign activities: receptions, marketing services and program support activities.

### **Opening an office abroad**

The opening of an office abroad is a priority for fewer than 30 percent of the associations.

## 6. Members' Main Export Market Development Challenges, According to Associations

### The numbers



#### \* Others include:

- distance
- need for a networking forum in the country "building products"
- knowledge of local language
- knowledge of future partners
- difficulty obtaining a visa, etc.

## In brief

### Association members require training in order to:

- deal with cultural differences;
- acquire the techniques and knowledge necessary to do business abroad;
- develop the means to deal with international competition; and
- get access to financing.

### Association members need information on:

- markets and market opportunities;
- trade regulations and rules of access;
- Canada's bilateral relations with their target country or countries;
- sources of financing and funding programs;
- local structures and infrastructures (the banking system, bureaucracy, political risk actors, the economic environment);
- cultural norms (social mores, traditions and customs, etc.);
- the best partners to choose; and
- procedures for obtaining visas, etc.

## **7. Services Identified by the Associations as Potentially Revenue-Generating but that are Currently Provided by the Government to the Business Community**

Seventy-four percent of the respondents identified activities currently provided by the government that compete with associations' capacity to deliver services to the same client base.

### **Services most often identified**

31% of the associations identified trade and ministerial missions;

11% identified trade fairs and catalogues;

11% identified business matching with foreign business contacts;

11% identified market information gathering and sectoral studies;

9% identified export training;

6% identified promotion activities of international trade events;

6% identified consulting services for trade issues;

6% identified seminars; and

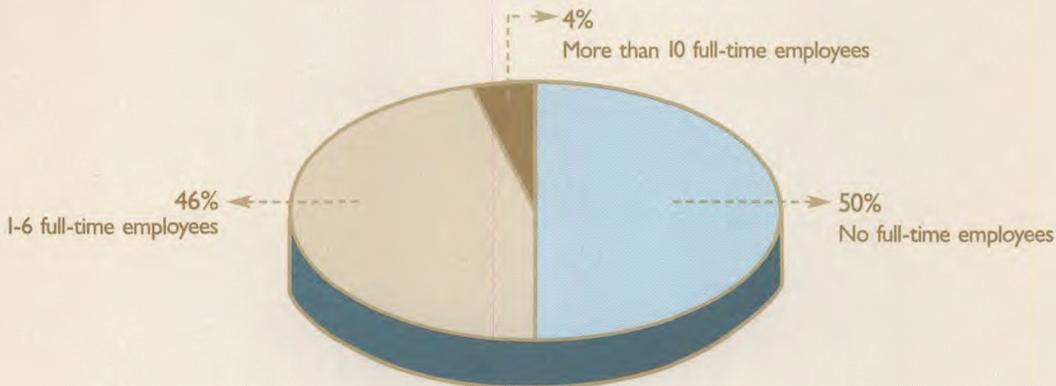
3% identified hospitality activities in Canada.

## Logistical Profile

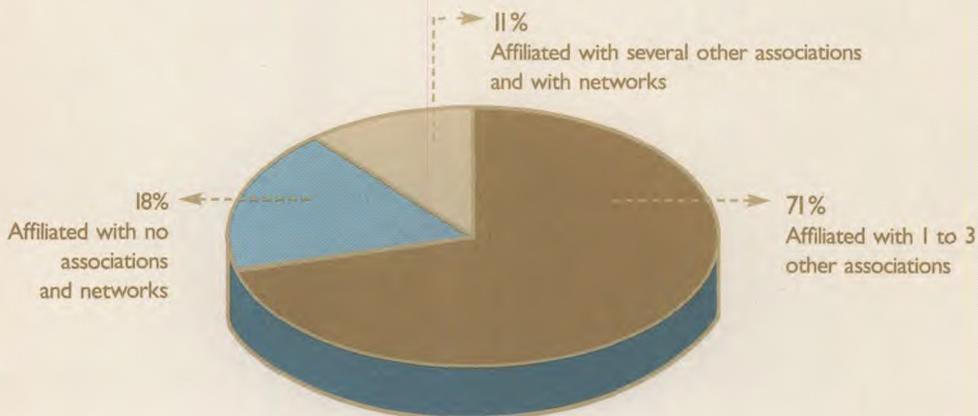
### I. Human Resources

- 57% of associations have an executive committee;
- 94% have a board of directors;
- 50% have full-time employees (ranging from one to more than 10);
- 37% have part-time employees (ranging from one to four);
- 58.3% have volunteers (ranging from one to more than 20);
- 36% have working committees (ranging from one to 12);
- 74% hold an assembly of members; and
- 35% hold an international assembly of members.

Distribution of associations according to the number of full-time employees



### 2. Affiliations with Networks and Other Associations



### 3. Requirements for Successful Start-up and Operation of an Association

The associations consider the following to be the most important requirements for successful operation:

- a precise mandate, including niches and objectives, and a detailed work plan
- a solid core of committed people, preferably high-profile Canadian business figures, who are ready to give of their time and can help the organization raise sufficient start-up funds
- sufficient financing
- competent employees to run the association
- a large number of members with strong business profiles
- a good network of contacts and affiliations with other organizations
- official, non-financial, support from the federal and/or provincial government

## *Relations with DFAIT and Other Government Services*

### **I. Frequency of Association Contacts with DFAIT and Other Government Services**

#### **In brief**

- 52% contact DFAIT at least once every six months;
- 65% contact an International Trade Centre at least once every six months; and
- 62% contact the post abroad at least once every six months.

#### **OR**

- 48% contact DFAIT no more than once a year or never do it;
- 34% contact the International Trade Centre no more than once a year or never do it; and
- 37% contact the post abroad no more than once a year or never do it.

#### **The numbers**

<b>Frequency of Contact Initiated by Association</b>	<b>With DFAIT</b>	<b>With Regional Trade Development Offices</b>	<b>With Posts Abroad</b>
once every 1 to 4 weeks	32%	37%	29%
once every 1 to 6 months	20%	28%	33%
once a year	13%	7%	9%
once every 1 to 5 years	2%	0%	6%
Never	33%	27%	22%
<b>TOTAL</b>	<b>100%</b>	<b>99%</b>	<b>99%</b>

## 2. Number of Employees and Former Employees of DFAIT on the Associations' Committees

	Percentage of associations with employees or former employees of DFAIT on their committees
DFAIT Employees	2%
former DFAIT Employees	Fewer than 1%

## 3. Awareness of, Use of, and Satisfaction with Federal Government Services

### General results

- The associations' average level of satisfaction with all the export-related services listed on the survey is 67 percent.
- On average, the associations use 21.38 percent of the services offered.
- On average, the associations are aware of 48 percent of the services offered.

### Associations' rating of services

#### Services with which the associations are *satisfied to very satisfied*

- Trade Commissioner Service
- Industry Canada's International Trade Centre (ITC)
- New Exporters to Border States (NEBS)
- New Exporters Training and Counselling Program (NEXPRO)
- InfoExport: [www.infoexport.gc.ca](http://www.infoexport.gc.ca)
- Canada's International Business Strategy (CIBS)
- Strategis Web site
- Canada Economic Development for Quebec Regions
- Canadian Technology Network (CTN)
- Agri-Food Trade Service (ATS)
- Business Development Bank of Canada (BDC)

- Export Development Corporation (EDC)
- Canadian Commercial Corporation (CCC)
- Canadian International Development Agency (CIDA)
- CIDA Industrial Cooperation Program (CIDA-INC)

**Services that the associations are *satisfied to not very satisfied***

- Team Canada Trade Missions
- Trade missions
- New Exporters to Overseas Markets (NEXOS)
- Forum for International Trade Training (FITT)
- Trade seminars
- Canada Export Newsletter
- WIN Exports
- International Business Opportunities Strategy (IBOC)
- Atlantic Canada Opportunities Agency (ACOA)
- Federal Economic Development Initiative for Northern Ontario (FEDNOR)
- Western Economic Diversification (WD)
- Program for Export Market Development (PEMD)

**Services with which the associations are *not very satisfied to highly unsatisfied***

- Team Canada Inc
- Team Canada Inc Web Service: [www.exportsource.gc.ca](http://www.exportsource.gc.ca)
- 1-888-811-1119 Team Canada Inc Hotline Number
- New Exporters to South America (NEXAS)

Details of rating for each service (1 = very satisfied and 4 = not satisfied)

Services	Are aware of	Have used	Level of satisfaction with
Trade Commissioner Service (TCS)	70%	60%	1.96
Industry Canada's International Trade Centre (ITC)	60%	40%	1.9
Team Canada Inc	70%	20%	2.89
1-888-811-1119 Team Canada Inc Hot Line Number	30%	10%	2.4
Team Canada Inc Web Service: <a href="http://www.exportsource.gc.ca">www.exportsource.gc.ca</a>	40%	10%	2.5
Team Canada Trade Missions	60%	20%	2.25
Trade missions	50%	10%	2.16
New Exporters to Border States (NEBS)	30%	7%	2
New Exporters to Overseas Markets (NEXOS)	40%	7%	2.3
New Exporters to South America (NEXAS)	20%	4%	2.5
New Exporters Training and Counselling Program (NEXPRO)	30%	9%	2
Forum for International Trade Training (FITT)	40%	20%	2.38
Trade seminars	60%	20%	2.38
Canada Export Newsletter	80%	60%	2.13
InfoExport: <a href="http://www.infoexport.gc.ca">www.infoexport.gc.ca</a>	50%	30%	1.92
WIN Exports	60%	40%	2.13
International Business Opportunities Strategy (IBOC)	40%	20%	2.28
Canada's International Business Strategy (CIBS)	30%	10%	1.67
Strategis Web site	50%	50%	1.81
Atlantic Canada Opportunities Agency (ACOA)	30%	10%	2.2
Canada Economic Development for Quebec Regions	30%	10%	1.8
Federal Economic Development Initiative for Northern Ontario (FEDNOR)	20%	7%	2.33
Western Economic Diversification (WD)	40%	10%	2.17
Canadian Technology Network (CTN)	30%	9%	2
Agri-Food Trade Service (ATS)	40%	20%	1.55
Program for Export Market Development (PEMD)	50%	20%	2.38
Business Development Bank of Canada (BDC)	70%	20%	2
Export Development Corporation (EDC)	80%	40%	1.53
Canadian Commercial Corporation (CCC)	50%	20%	1.57
Canadian International Development Agency (CIDA)	80%	30%	1.73
CIDA Industrial Cooperation Program (CIDA-INC)	60%	20%	1.6

Results by category of services (1 = very satisfied and 4 = not satisfied)

Services	Satisfaction	Use
Trade Commissioner Service	1.96	60.0%
Industry Canada's International Trade Centre (ITC)	1.9	40.0%
Team Canada Inc services • Team Canada Inc • 1-888-811-1119 • www.exportsource.gc.ca	2.59	13.33%
Team Canada trade missions	2.25	20.0%
Other trade missions	2.16	10.0%
Training programs and services • NEBS • NEXPRO • NEXOS • FITT • NEXSA	2.23	9.0%
Trade seminars		20.0%
Information services • CanadaExport • www.infoexport.gc.ca • WIN Exports • Business Opportunities Centre • Canada's International Business Strategy	2.02	32.0%
Program for Export Market Development (PEMD)	2.38	20.0%
Industry Canada services (except for Strategis) • Canada Economic Development for Quebec regions • FEDNOR • WD • Canadian Technology Network	2.1	
Strategis	1.81	50.0%
Agri-Food Trade Service	1.55	20.0%
Crown corporations • BDC • EDC • CCC	1.61	26.66%
CIDA services and programs • CIDA • INC	1.67	25.0%

#### 4. Cooperation with DFAIT to Promote International Trade

	Fully agree	Agree with reservations	Agree somewhat	Disagree
Your association served as a catalyst to focus the attention of Canada and Canadian companies on a given region or country.	79.16%	10.2%	4.08%	6.12%
Your association is willing and in position to participate more actively in co-ordinating activities usually managed by governments, such as trade missions, trade fairs and Team Canada activities.	72.9%	12.24%	6.12%	8.16%
Your association is able to work with DFAIT and Industry Canada to develop Canadian approaches to these markets.	70.8%	16.3%	6.12%	6.12%
Your association would like, and would be able, to play an official role in strategies to promote international business development.	75%	14.29%	2.04%	8.16%
Your association conducts numerous activities that complement the government's diplomatic efforts.	66.6%	14.29%	10.2%	8.16%
It would be necessary to set up a platform of productive exchanges and/or to establish a common secretariat between bilateral councils.	48.9%	25%	10.42%	14.58%
Your association conducts activities that overlap with government services	12.5%	26.53%	18.37%	40.82%

## ACKNOWLEDGMENTS

JoAnna Townsend (Director - Export Services for Small- and Medium-Sized Enterprises) outlined the initial directions of the project, defined the parameters for submission of the final report and guided the development of the survey and final report.

Julie Cavanagh (consultant) gave shape to the project, conducted the survey and prepared the final report.

Rick Clynick (Deputy Director - Export Services for Small- and Medium-Sized Enterprises) and Peter MacArthur (Director, Overseas Operations) were the main sources of advice at all stages of the project. Carl Pilon (Policy Analyst, Policy and Strategic Planning Division) contributed to the initial stages of the project.

The following served on the internal advisory committee and took part in verification of the survey and final report:

Ian Burchett	Deputy Director, China and Mongolia Division
Scott Fraser	Deputy Director, South Asia Division
Georges Lemieux	Deputy Director, Middle East Division
David McGregor	Desk Officer, Eastern Europe Division
David McKinnon	Deputy Director, Korea and Oceania Division
Michel Têtu	Executive Assistant, Office of the Deputy Minister for International Trade

The following served on the external advisory committee and took part in verification of the survey and final report:

Murray A. Jans	Executive Director, Canada-India Business Council
Halina Ostrowski	President, Canadian Council for the Americas
Terry Roberts	President, CUBI Chamber
Iva Schafferova	Director, Canada Eurasia and Industry Alliance
Maianna Simeone	Executive Director, Italian Chamber of Commerce in Canada
Fred Spoke	President, Canada China Business Council

Jean-Pierre Guertin (Computer Technologist, European Union Division) - built a database to facilitate processing of the quantitative and qualitative data, generated the spreadsheets and acted as resource person for use of the system.

Shen Shenjie (Policy Analyst, Trade and Economic Analysis Division) - verified the statistical computations.

Lori Emmet (International Business Opportunities Centre) - did the publishing work for the multiple versions of this survey.

Elizabeth MacFie edited the final report.

Readers are invited to forward their comments to the Export Services for Small- and Medium-Sized Enterprises Division, to the attention of Rick Clynick, Deputy Director; by telephone at (613) 944-0494, by fax at (613) 996-9265 or by e-mail at [rick.clinick@dfait-maeci.gc.ca](mailto:rick.clinick@dfait-maeci.gc.ca)

## APPENDICES

### *Appendix 1*

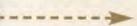
### *List of Canadian Bilateral Business Associations*

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Updated April 2000

- Belgian Canadian Business Association
- Board of Trade and Industry Canada-China
- Brazil Canada Chamber of Commerce
- British Canadian Chamber of Trade and Commerce
- Canada China Business Council
- Canada Eurasia Energy and Industry Alliance
- Canada Finland Chamber of Commerce
- Canada Japan Business Associations of Calgary
- Canada Japan Business Committee
- Canada Pacific Russia Trade Centre
- Canada Pakistan Business Council
- Canada Russia Business Forum
- Canada Singapore Business Association
- Canada South Africa Chamber of Business
- Canada Taiwan Business Council
- Canada Vietnam Business Association
- Canada-Arab Business Council
- Canada-Czech Republic Chamber of Commerce
- Canada-India Business Council
- Canada-India Chamber of Commerce
- Canada-Indonesia Business Council of Toronto
- Canada-Israel Chamber of Commerce
- Canada-Korea Business Association
- Canada-Philippines Business Council
- Canada-Philippines Trade Council

- Canada-Poland Chamber of Commerce in Toronto
- Canada-Sri Lanka Business Council
- Canadian Armenian Business Council Montreal Inc.
- Canadian Armenian Business Council (Ontario) Inc.
- Canadian Bulgarian Chamber of Commerce
- Canadian Council for the Americas
- Canadian German Chamber of Industry and Commerce Inc.
- Canadian Lebanese Chamber of Commerce and Industry
- Canadian Slovenian Chamber of Commerce
- Chamber of Commerce Equador-Canada
- Chambre de commerce Belge et Luxembourgeoise au Canada
- Chambre de commerce Canada Chili
- Chambre de commerce Canada Pologne
- Chambre de commerce Canada Tunisie
- Chambre de commerce et d'industrie Canada-Colombie
- Chambre de commerce et de l'industrie Canada-sénégalaise
- Chambre de commerce Mexico-Canada
- Chambre du commerce, d'industrie et du tourisme Canada-Afrique de l'ouest et du centre
- China-Canada Business Association
- CUBI Chamber (Canadian Ukraine Business Initiative)
- Danish Canadian Chamber of Commerce
- European Union Chamber of Commerce in Toronto
- Forum Francophone des Affaires
- French Chamber of Commerce in Canada
- Hong Kong Canada Business Association (B.C.)
- Hong Kong Canada Business Association (Ontario)
- Hungarian-Canadian Chamber of Commerce
- Indo-Canadian Chamber of Commerce
- Iran-Canada Business Council
- Ireland Canada Chamber of Commerce of B.C.
- Italian Chamber of Commerce of Winnipeg



- Italian Chamber of Commerce of Montreal
- Italian Chamber of Commerce of Toronto
- Malaysia Canada Business Council–BC Chapter
- North American Kyrgyz Business Council
- Pacific Basin Economic Council–Canadian Committee
- Slovak Canadian Chamber of Commerce
- Swiss Canadian Chamber of Commerce Montréal Inc.
- Swedish-Canadian Chamber of Commerce
- The Japan Society
- Turkish Canadian Business Council Inc.
- Turko-Canadian Chamber and Council for Commerce and Industry
- Vancouver Mokuyokai Society

## *Appendix 2*

### *Detailed Research Methodology*

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#### **Objective**

DFAIT conducted this survey in order to gain a better understanding of bilateral business associations so that the Department can work with them more effectively.

#### **Definition of a Bilateral Business Association**

For the purposes of this survey, a bilateral business association is an organization:

- one of whose main activities is trade promotion and development for Canadians who export and do business abroad;
- whose promotional activities centre on one country or region; and
- that answers first and foremost to its members.

Note:

- None of these criteria excludes organizations that also promote imports and foreign investment in Canada.
- The term "bilateral business association" includes chambers of commerce, business and trade councils, business or business people's forums, and other designations used to identify an organization corresponding to the above definition.

#### **Listing the Bilateral Business Associations in Canada (BBAs)**

Until it conducted this survey, DFAIT had never compiled a list of all the bilateral business associations in Canada. Enquiries with other governmental organizations likely to work with BBAs (CIDA, Canadian Heritage, and Industry Canada) revealed that this was probably true for the federal government as a whole.

The list of BBAs to be surveyed was assembled from the following sources:

- geographic branches of DFAIT
- WIN Export
- Strategis
- Canadian Heritage: Multiculturalism directory for business people
- Regional international trade offices in Vancouver, Edmonton, Toronto and Montreal.

The researcher then telephoned each of the associations in the initial list, in order to:

- confirm that they all met the definition criteria; and
- update contact information.

A number of associations on the initial list were eliminated, because:

- they did not meet the definition criteria;
- they were local chapters of a larger national association (in such cases only the national office was consulted in the study);
- it was not possible to confirm the contact information for the association;<sup>6</sup>  
or
- the organization had ceased operations.

This resulted in a list of 83 bilateral business associations to be surveyed. The list was approved by Roger Ferland, Director General, Trade Commissioner Service, Overseas Programs and Services of DFAIT.

### Development of the Survey

The project team decided that the best way to quickly obtain high-quality data was to send a survey to each of the associations.

The first step in the development of the survey was the establishment of a preliminary list of theme areas in which to develop questions. These themes were drawn from a consultation of reports, newsletters, internal DFAIT documents and letters on several associations, existing databases within DFAIT, trade publications and so on. No potential themes were screened out at this stage, in order to obtain as thorough a database as possible.

To create the most appropriate questions, we produced a discussion paper about considerations for the establishment and maintenance of a bilateral business association. The objectives were to identify current DFAIT research on bilateral associations and to propose an angle from which to develop questions.

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<sup>6</sup> We used Bell Canada's assistance service in an attempt to confirm the associations' contact information and then ran the lists through the international trade offices in Vancouver, Edmonton, Toronto, Montreal and through all DFAIT geographic branches.

The survey was revised by the Export Services for Small- and Medium-Sized Enterprises Division (TSME), the Policy and Strategic Planning Division (TBX), and by two committees—one internal and the other external. The internal committee consisted of officials of DFAIT geographic branches and the Chief of Staff of the Deputy Minister for International Trade (see Acknowledgments). The external committee consisted of selected bilateral business association leaders (see Acknowledgments). The survey was sent for comments first to the internal committee, and then to the external committee.

The participation of the internal committee was invaluable in the development of the format and presentation of the questions. All members approved the format and structure of the survey.

The suggestions from the external committee greatly helped in the preparation of the choice of responses for each question. In general, the associations indicated that the questions were relevant, specific, succinct, and of appropriate scope. The fact that the questions related to both past and future concerns enhanced the value of the survey.

Once the final comments were incorporated, the survey was approved by the Director General of the Trade Commissioner Service, Overseas Programs and Services, Roger Ferland.

## **Content of the Survey**

The survey contained 39 questions, divided into three sections.

### Section A - Association Profile

1. Services
2. Main activities: promotion, communication, information, etc.
3. Budget information
4. Management structure
5. Competitive advantages

### Section B - Membership Profile

### Section C - Contact with DFAIT and Other Government Departments and Agencies

## Distribution of the Survey and Follow-up

The survey and a cover letter, signed by Roger Ferland, Director General of the Trade Commissioner Service, Overseas Programs and Services, were mailed to each of the associations.

The associations were asked to complete and return the survey within a month. The researcher followed up on the mailing, contacting the associations three times, on average, following the mail-out, making:

- a call three days after the estimated date of receipt to verify that the survey had been received (those calls were followed by the faxing of a further 23 surveys to associations that had either misplaced the survey or had never received it);
- a second call to determine how the completion of the survey was proceeding (asking the associations to not make extraordinary efforts to complete the whole survey, but rather to indicate any questions they felt were irrelevant in their particular case); and
- a third call to remind the associations of the deadline (followed by the receipt of about 50 percent of all of the surveys in the final sample within two days of this call).

### The Response Rate: 58 Percent

The targeted associations returned 48 out of 83 surveys that were distributed, a 58-percent response rate. The replies from three of the associations were not included in the survey, because their mandate and structure varied too greatly from the definition of a bilateral business association: they concentrated on culture, or were oriented exclusively toward promoting the Canadian market to foreign businesses and members of other associations. The researcher thus processed 45 surveys from a total of 80 associations, constituting a sample of 57 percent of the total population surveyed.

## **On What Type of Associations are the Results of the Research Based?**

The results are based on a cross section of associations - small, medium and large sized - as one would expect from such a high response rate. Some have large revenues, other small. Similarly the membership base is widely dispersed. Geographically, responses have come from associations dealing in almost all of the major foreign markets of interest to Canadian exporters.

## **Support for the Analysis of the Results**

### **Database**

Jean-Pierre Guertin, Computer Technologist, European Union Division, designed a database for manipulation of the resulting data.

### **Analysis Enhancement and Quality Control**

The Trade and Economic Analysis Division (EET) assisted with statistical data manipulation.

## *Appendix 3*

### *Constraints Faced by Bilateral Business Associations*

To survive as an organization and increase its annual revenue each association must:

- build its legitimacy with the business community and win their confidence;
- increase its own business opportunities and income;
- retain its existing members and recruit new ones; and
- build its capacity to provide quality services.

#### **Legitimacy of Bilateral Business Associations**

The main challenge for all associations is to maintain and expand the membership base<sup>7</sup>. Because members are the associations' main revenue source, the problems of maintaining membership go hand in hand with problems of maintaining income.

The challenge of holding and expanding membership is associated with at least seven facets of the organization:

- visibility;
- quality of services;
- quality of contacts;
- types of services;
- the interest of the business community as a whole in the national market targeted by the association;
- the association's reputation; and
- the confidence of the business community in the association.

The number of members is one of the first yardsticks of legitimacy of an association. However, this number has to be weighed against the importance, for Canada, of the market targeted by the association. For example, a small membership base may adequately represent a limited number of business people interested in a particular national market.

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<sup>7</sup> The oldest associations tend to have fewer members than do the more recently formed ones.

## Income Opportunities and the Importance of Specific Activities

Associations need revenue sources in addition to their members' fees. Membership payments, although they are the primary revenue source for almost all associations, are still not enough to cover budgetary requirements.

The second most common source of income for associations is the sale of services. Associations that offer specific services over and above their general services tend to be in a better financial position than the ones providing only general services.<sup>8</sup>

The variety of services offered contributes to the organizations' financial flexibility. The specific services also generate other benefits: they raise the visibility of the association and pique members' interest.

In short, associations need to increase their opportunities for selling services while maintaining a mixed profile of general and specific activities. Providing merely general services is not sufficient to maintain the commitment of key members and the interest of a critical number of members over the long haul.

## Maintaining Membership Competition

Some bilateral business associations are competing for the same national markets. Eight Canadian bilateral business associations are concentrating on Japan, three on India, four on Italy and two for each of the following countries: China, Taiwan, Hong Kong, Germany, Poland, Colombia, Turkey, Hungary and Armenia.

Some of these associations compete openly for the same business members and founding members, that is, a number of associations have the same businesses as members. Founding members play a role of prime importance for an association's financial stability by agreeing to pay higher fees for their membership. Canadian firms with international operations will be present in a number of countries and may therefore belong to a number of different associations.

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<sup>8</sup> For distinctions between general and specific services, please refer to Section IV (Profile of Mandate—Activities, Objectives and Services) of "Research Findings" in this report.

The report does not demonstrate any advantages that accrue due to the existence of several associations for one national market. The results suggest, on the other hand, that although a market's importance enhances the association's potential, there is a limit to the number of possible associations for a single market<sup>9</sup>. The report does not reveal the scale of inter-association competition, or whether small associations are positioning themselves by providing services that are not offered by larger associations working in the same national markets.

There are no bilateral associations which operate exclusively to penetrate the following markets: the US, Argentina, South Korea, the Netherlands, Australia, Austria, Saudi Arabia, Venezuela, New Zealand, Thailand and Cuba.

### **Competitive Positioning for Canadian Exporters**

Associations, businesses and individuals, who are also members of an association, can be in competition to provide services to a Canadian export client base. Many of these services are also available from the Department. Associations and businesses compete at times for the same Canadian client base: the exporter or a company that is preparing to export. At times the Department also provides services to the same client base.

Associations feel they could provide the following services: trade mission organization, production of trade fairs and catalogues, business matching with foreign business contacts, production of market information and sectoral studies, export training, consulting services on export issues, promotional activities of international trade events and hospitality services for foreign business contacts in Canada.

Associations have stated they have increasing capacity to deliver these services in conjunction with the Department or separately, on a case by case basis. An increased delegation of these services to associations would bring financial benefit to the latter.

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<sup>9</sup> Some 66 percent of bilateral business associations in Canada with budgets exceeding \$50,000 concentrate on one of the 11 most important markets for Canada and 93 percent of them focus on one of the 40 highest priority national markets. However, with few exceptions, all the associations which, despite concentrating on one major national market, still have budgets below \$50,000 have direct competitors for these markets.

## *Appendix 4*

### *Issues of Common Interest*

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One of the recommendations of this report is that the Department and the bilateral business associations meet to discuss cooperation toward mutual goals. Suggested points to be addressed here are grouped in three sections: Suggested Activities for the Associations, Suggested Activities for DFAIT and Coordinating the Common Activities of Associations and DFAIT.

#### **I. Suggested Activities for the Associations**

Associations could benefit from a promotional strategy aimed at key economic sectors in their target national market. For this purpose, better partnership with sectoral business associations could be considered.

##### **Services for women in business**

It would be beneficial for the associations to increase their awareness of the needs of businesswomen in Canada, include them as members and develop services for them. Alternatively, bilateral business associations could benefit from forging links and organizing joint events with women's business organizations.

##### **Revenue-generating services that associations could develop**

###### *Trade missions*

The organization of trade and ministerial missions: these are the services identified as potentially revenue-generating by the largest number of associations. These activities are of interest to associations because they are directly related to their mandate, provide good sources of revenue, give the association visibility and help them build their capacities by building contacts and offering services.

###### *Organizing trade promotion events*

This service is perfectly in keeping with associations' mandate and gives them visibility. Though a single event is not a major source of additional revenue, a number of them may be financially worthwhile. These include: receptions, organizing venues for visiting delegations, meetings, panel discussions, business programs for field trips and mission heads, seminars, workshops, business lunches, social events, hosting foreign trade delegations and other similar functions.

### *Follow-up to trade promotion activities*

The associations point out that the government does not have the human resources to follow-up trade promotion initiatives. This is an area of responsibility to be considered by associations.

### *Networking and matchmaking service*

This is a service that companies would be willing to pay for. To provide this service, the associations need local partners in Canada and in the foreign market. (DFAIT also assists in matchmaking and contract searching. Please see point 3. "Coordinating the Common Activities of Associations and DFAIT".)

### *Organizing trade fairs*

Associations do represent Canadian companies at trade fairs. This is an area for expansion.

### *Training*

Although the associations themselves identified training as one of their members' foremost needs, virtually none provide training services. Given the low rate of response to questions about members (an average of 34 percent of survey respondents abstained from these questions), compared with the response rate to all the other questions (five percent abstained), it appears that the associations are not sufficiently aware of their members' needs to identify the particular types of training they would be willing to pay for.

### **Consulting on trade issues**

Associations could use their knowledge of target markets and the business community in Canada and abroad for consultation on specific issues such as investigating companies' credibility and offering recommendations on foreign companies.

Associations could offer to their members a list of foreign companies they would recommend as good potential business partners as well as offering a credibility report of the financial capacity of the foreign firm.

### **Catalogues**

Associations could develop catalogues of members' products and services being offered for promotion in targeted markets.

## **2. Suggested Activities for DFAIT**

### **Profiles of associations**

Association profiles should be readily available to Canadian business people and to employees at the various government points of service.

### **Market intelligence**

Market intelligence is key to the success of members being in the position to benefit fully from new business opportunities. Due to the high costs associated with producing market reports, associations cannot effectively deliver these tools. They recommend that the Department continues to dedicate increased funding to the production of timely market reports.

### **Companies in the Atlantic provinces**

The Atlantic provinces are significantly under-represented within the associations. It would be worthwhile to explore who is representing the interests of companies in this region of Canada.

### **Outreach activities with embassies**

Embassies could outreach to specific bilateral business associations to involve their members in seminars, conferences, fairs in their territories. Also, when trade commissioners are on outreach programs within Canada, contact should be made with the bilateral business association to arrange meetings with their members as well as to use them when prominent foreign visitors tour within Canada.

### **Setting up offices abroad**

Embassies and trade commissioners could assist Canadian bilateral business associations establishing a local affiliation. This however will be dependant upon the size and budget of the association.

### **3. Coordinating the Common Activities of Associations and DFAIT**

#### **Networking Meetings**

With their knowledge of the business community, associations could be a source of contacts in the Canadian private sector. They provide access to key political and business contacts in Canada and the target region(s).

#### **Matchmaking and searching for opportunities**

The Department offers this service through its International Business Opportunities Centre (IBOC) and its offices abroad. Business people could benefit from better channels of communication between this service and the associations. The associations could identify potential partners, support matchmaking and put companies in touch to promote partnerships.

#### **Trade missions, organizing trade promotion events and follow-up to trade promotion activities**

These possible revenue-generating activities are also areas of coordination between the associations and DFAIT. To an extent, this is already being done on a case-by-case basis but not with any consistency or formal policy within the Department.

## **Information and advice on trade rules and regulations**

Associations provide technical information and advice on import-export rules and regulations and offer consulting services on specific issues. Associations need to become more familiar with the tools available from DFAIT that could be used to assist their membership.

## **Trade negotiations**

There may be potential for associations to play a role in trade negotiations with target partners using their important contacts to obtain information and comments regarding proposed policy etc.

## **Advocacy**

Associations do advocacy work with the Canadian government and foreign governments.

## **Technical support for business start-ups**

Associations provide technical support for business start-ups in foreign markets.

## **Team Canada's 1-888 number**

The associations should offer members information that can also be obtained through Team Canada's 1-888 number. The associations and DFAIT can also seek to coordinate their provision of information on matters such as technical barriers to exporting and import-export rules and regulations.

## **International Business Opportunities Centre (IBOC)**

Some associations offer services which, on paper at least, are similar to those offered by DFAIT's International Business Opportunities Centre (IBOC). This Centre and some of the associations could look into developing a closer partnership.

*Appendix 5*  
*Survey and letter*

**Survey of Bilateral Business Associations, May 1999**

Individual responses to this survey are confidential. Your assistance is important to help us know each other better. Please complete and return by May 21<sup>st</sup>, 1999. Thank you for your cooperation. Your care and attention will assist us in better understanding your needs and those of your members.

NOTE: To answer questions, feel free to refer to your association's brochure (please enclose with returned survey) and/or annual report and/or printed copy of the association's web site.

First name \_\_\_\_\_ Family name \_\_\_\_\_  
Position in the association \_\_\_\_\_  
Member of the association since 19 \_\_\_\_

Please complete the following in order for us to better reach you.

**A. Head Office's Coordinates** (Give page reference if preferred)

See attached

\_\_\_\_\_  
\_\_\_\_\_

**B. Do you have regional offices?**  Yes  No. How many? \_\_\_\_\_

If yes, their coordinates are: (Give page reference if preferred)

See attached  Not available

\_\_\_\_\_  
\_\_\_\_\_

**C. Do you have offices abroad?**  Yes  No. How many? \_\_\_\_\_

If yes, their coordinates are (Give page reference if preferred)

See attached  Not available

\_\_\_\_\_  
\_\_\_\_\_

## Section A

### Association's General Profile

1. In what year was the association established? In 19\_\_\_\_
  
2. In which country(ies) does your association focus its attention?  
\_\_\_\_\_
  
3. What is the legal status of the association? (Please check the appropriate box.)  
Provincially incorporated       Federally incorporated   
Registered       Non profit organization
  
4. Do you publish a Newsletter?  Yes     No. If yes, Since 19\_\_\_\_  
Title: \_\_\_\_\_  
Language of publication:    English       French       Other \_\_\_\_\_  
Frequency:    Annual       Monthly   
                  Semi-annual       Weekly   
                  Quarterly       Other \_\_\_\_\_
  
5. Do you publish a members' directory?    Yes     No     Internal use only   
Language of publication:    English     French     Other \_\_\_\_\_  
Frequency:    Every year     Every two years     Other \_\_\_\_\_
  
6. Research papers on trade:  
You have published \_\_\_\_\_ research paper(s) on international trade since 19\_\_\_\_.  
(Give page reference if you wish to indicate the title and year of your publications.)  
See attached
  
7. Your association's web site address is: [http://www.\\_\\_\\_\\_\\_](http://www._____.)  
And is updated:      daily     weekly     monthly     Other: \_\_\_\_\_
  
8. What is the current mandate of the association?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. What are your principal activities and services?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

10. What are the main competitive advantages your association offers (for example, compared to other organizations such as sectoral associations and government)?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

II. What are the main challenges that you intend to tackle in the next two years?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

12. How important are the following activities in the association's agenda?

(Please check ✓ the appropriate box)

Activity	Very important	Important	Somewhat important	Not important	Never do it
Recruitment of new members					
Conduct special membership drives					
Members meeting (annual or biannual)					
Hold international meetings of regional groups					
Publication of directory of members					
Maintain the association's web site					
Publication of association's Newsletter					
Outreach activities					
Provide services and activities to help small businesses prepare for export					
Training services					
Consultation services					
Business matching for members					
Gathering intelligence information on trade and economic and political issues in the target region or country					
Publication of market intelligence reports					
Conferences, seminars and round tables in Canada					

Continued on next page.

Activity	Very important	Important	Somewhat important	Not important	Never do it
Hospitality events in Canada					
Hospitality events abroad					
Participate/recruitment for Missions					
Lead Missions					
Participate in Trade Fairs					
Maintain an office abroad					
Support the program activities in the foreign market(s)					
Conduct marketing services abroad					
Assessment of members' needs					
Adaptation of services to meet changing needs of members					
Monitoring/measuring results of association's activities and services					
Develop new services					
Looking for new revenue sources					
Lobbying activities					
Advices DFAIT (strategies, venues, program, etc.)					
Activities that complement the government's diplomatic efforts					

13. What was your association's income for the last fiscal year \$ \_\_\_\_\_

or (Answer optional)

- Under \$25,000  From \$50,000 to \$99,999   
 From \$25,000 to \$49,999  \$100,000 or more

14. Over the last 3 fiscal years have your association's revenues increased, decreased or stayed the same? (Answer optional)

	Increased by	Stayed the same	Decreased by
Over the last three fiscal years our revenues have:	%	<input type="checkbox"/>	%

15. Have you ever received, and do you still receive, financial support from:

- |   |                              |                                |                             |
|---|------------------------------|--------------------------------|-----------------------------|
| Private sector sponsorship                                | Yes <input type="checkbox"/> | Still <input type="checkbox"/> | No <input type="checkbox"/> |
| An international organization                             | Yes <input type="checkbox"/> | Still <input type="checkbox"/> | No <input type="checkbox"/> |
| The Department of Foreign Affairs and International Trade | Yes <input type="checkbox"/> | Still <input type="checkbox"/> | No <input type="checkbox"/> |
| The Canadian International Development Agency             | Yes <input type="checkbox"/> | Still <input type="checkbox"/> | No <input type="checkbox"/> |
| The Government of Canada                                  | Yes <input type="checkbox"/> | Still <input type="checkbox"/> | No <input type="checkbox"/> |
| A provincial government                                   | Yes <input type="checkbox"/> | Still <input type="checkbox"/> | No <input type="checkbox"/> |

16. What percentage of your annual budget do each of these items account for?

Activity	Percent
Annual membership dues	%
Sales of publications	%
Organization of trade fairs (sponsored by DFAIT)	%
Organization of trade fairs (NOT sponsored by DFAIT)	%
Organization of missions (sponsored by DFAIT)	%
Organization of missions (NOT sponsored by DFAIT)	%
Sale of services (other than any mentioned in this list)	%
Sale of products (other than publications)	%
Financial support from the Canadian International Development Agency (CIDA)	%
Financial support from other government agencies	%
Financial support from an international agency/organization	%
Financial support from any provincial government	%
Other:	% % %

17. Who are the members of your executive committee? For each person, state his or her name and position on the committee, the name of the company the person represents and his/her position in that company. (Give page reference if preferred)

Not applicable  Internal use only  See attached

18. Who are the members of your board of directors? For each person, state his or her name and position on the board, the name of the company the person represents and his/her position in that company. (Give page reference if preferred)

Not applicable  Internal use only  See attached

19. Frequency of meetings (Please fill out with a number - one option per row)

Executive committee meets every \_\_\_\_\_ days OR every \_\_\_\_\_ month(s)  
Board of directors meets every \_\_\_\_\_ days OR every \_\_\_\_\_ month(s)  
Canadian Members assembly meets every \_\_\_\_\_ months OR every \_\_\_\_\_ year(s)  
International members assembly meets every \_\_\_\_\_ months OR every \_\_\_\_\_ year(s)

20. There are \_\_\_\_\_ persons working full time in \_\_\_\_\_ (city)  
and their positions are:

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_

There are \_\_\_\_\_ persons working full time in \_\_\_\_\_ (city) and their positions are:

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_

21. There are \_\_\_\_\_ persons working part-time in \_\_\_\_\_ (city) and their positions are:

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_

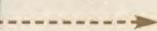
There are \_\_\_\_\_ persons working part-time in \_\_\_\_\_ (city) and their positions are:

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_

22. The association has a group of volunteers, numbering \_\_\_\_\_ persons. It has \_\_\_\_\_ working committees.

23. With which other associations or networks of associations is your association affiliated in Canada and abroad?

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_



*Section B*  
*Membership Profile*

24. How many members did the association have in:  
1999: \_\_\_\_\_ members    1995: \_\_\_\_\_ members    1990: \_\_\_\_\_ members

25. What is the minimum number of members you need to maintain the mandate and services of the association?  
No minimum number     Does not apply     The amount is \_\_\_\_\_

26. What is your fee structure for membership?  
(Please use appendix if preferred)    See attached

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27. To which sectors do your members belong? (Please check ✓ all applicable categories.)

Sector		Sector	
Agriculture and agri-food	<input type="checkbox"/>	Financial services	<input type="checkbox"/>
Energy	<input type="checkbox"/>	Government services	<input type="checkbox"/>
Environment	<input type="checkbox"/>	Health care and social services	<input type="checkbox"/>
Fisheries, coastal resources and marine	<input type="checkbox"/>	Investment	<input type="checkbox"/>
Forestry	<input type="checkbox"/>	Legal services	<input type="checkbox"/>
Mining, petroleum, oil and gas	<input type="checkbox"/>	Public administration	<input type="checkbox"/>
Natural resources	<input type="checkbox"/>	Retail trade	<input type="checkbox"/>
Waste management and remediation	<input type="checkbox"/>	Service industry	<input type="checkbox"/>
Building materials	<input type="checkbox"/>	Transport and warehousing	<input type="checkbox"/>
Construction	<input type="checkbox"/>	Utilities	<input type="checkbox"/>
Engineering	<input type="checkbox"/>	Wholesale trade	<input type="checkbox"/>
High technology	<input type="checkbox"/>	Real estate and rental and leasing	<input type="checkbox"/>
Housing	<input type="checkbox"/>	Arts and culture	<input type="checkbox"/>
Information technology	<input type="checkbox"/>	Communications and information	<input type="checkbox"/>
Manufacturing and chemical	<input type="checkbox"/>	Education and training	<input type="checkbox"/>
Medical/biotechnology	<input type="checkbox"/>	Entertainment and recreation	<input type="checkbox"/>
Telecommunications	<input type="checkbox"/>	Project management	<input type="checkbox"/>
Tourism	<input type="checkbox"/>	Publishing	<input type="checkbox"/>
Accommodation and food services	<input type="checkbox"/>	Radio broadcasting	<input type="checkbox"/>
Banks and financial institutions	<input type="checkbox"/>	Other	<input type="checkbox"/>
Consulting services	<input type="checkbox"/>		

28. What is the regional distribution of your membership?

Regional membership	Number
In Canada	
The West (British Columbia to Manitoba)	
Central Canada (Quebec and Ontario)	
The Atlantic (N.S., P.E.I., N.B. and Nfld.)	
N.W.T., Yukon and Nunavut	
Abroad	
<b>TOTAL</b>	

29. Please indicate the categories of your membership:

Member category:	Number	Member category:	Number
Services exporters	_____	Students	_____
Goods exporters	_____	University/college academics	_____
Both services and goods exporters	_____	Professionals	_____
		Others	_____

30. How many of your member-companies fall into the following categories (ranked by annual sales figures):

Micro-sized (less than \$500,000)	_____	Medium-sized (from \$5 to \$50 million)	_____
Small-sized (from \$500,000 to \$5 million)	_____	Large-sized (\$50 million and more)	_____

31. Do your recruitment activities target a specific clientele (for example, sector, size, cultural community, region or other)? If you target specific clientele please respond to the following?

	Highly Important	Not Important	Important
Company size	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sector focus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Destination market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32. What are the main export market development challenges faced by your exporter members?

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**Section C**

**Contact with the Department of Foreign Affairs and International Trade and other Government Services**

33. What is the frequency of your relations with:

<b>DFAIT in Ottawa Development offices</b>	<b>Regional Trade</b>	<b>Posts Abroad</b>
Every ___ week(s)	Every ___ week(s)	Every ___ week(s)
Every ___ month(s)	Every ___ month(s)	Every ___ month(s)
Every ___ year(s)	Every ___ year(s)	Every ___ year(s)
Never <input type="checkbox"/>	Never <input type="checkbox"/>	Never <input type="checkbox"/>

34. Please use a check mark ✓ to answer the following questions:

<b>Questions</b>	<b>Yes</b>	<b>No</b>
Do any employees of DFAIT sit on any of your councils or committees?	<input type="checkbox"/>	<input type="checkbox"/>
Do any former employees of the DFAIT sit on any of your councils or committees?	<input type="checkbox"/>	<input type="checkbox"/>

35. For each of the following resources, please indicate if you are aware of it and, if you have used it, indicating your level of satisfaction (1 being very satisfied and 4 not satisfied).

If Aware	If Used It	Program/Services	Level of satisfaction (1 to 4)
<input type="checkbox"/>	<input type="checkbox"/>	Trade Commissioner Service (TCS)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Team Canada Inc	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	1-888-811-1119 Team Canada Inc Hot Line number	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Team Canada Inc web service: <a href="http://www.exportsource.gc.ca">www.exportsource.gc.ca</a>	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Team Canada Trade Missions	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	New Exporters to Border States (NEBS)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	New Exporters to Overseas Markets (NEXOS)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	New Exporters to South America (NEXSA)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	New Exporters Training and Counseling Program (NEXPRO)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Trade Missions	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Trade Seminars	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	CanadExport Newsletter	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	InfoExport: <a href="http://www.infoexport.gc.ca">www.infoexport.gc.ca</a>	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	WIN Exports	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	International Business Opportunities Centre (IBOC)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Program for Export Market Development (PEMD)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Canada's International Business Strategy (CIBS)	1 2 3 4

If Aware	If Used It	Program/Services	Level of satisfaction (1 to 4)
<input type="checkbox"/>	<input type="checkbox"/>	Industry Canada's International Trade Centre (ITC)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Strategis Web site	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Agri-Food Trade Service (ATS)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Business Development Bank of Canada (BDC)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Canadian International Development Agency (CIDA)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	CIDA Industrial Cooperation Program (INC)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Atlantic Canada Opportunities Agency (ACOA)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Canada Economic Development for Quebec Regions	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Federal Economic Development Initiative for Northern Ontario (FedNor)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Western Economic Diversification (WD)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Export Development Corporation (EDC)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Forum for International Trade Training (FITT)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Canadian Commercial Corporation (CCC)	1 2 3 4
<input type="checkbox"/>	<input type="checkbox"/>	Canadian Technology Network(CTN)	1 2 3 4

36. Please check ✓ the appropriate option for the following statements:

	Fully agree	Agree with reservations	Agree somewhat	Disagree
Your association served as a catalyst to focus the attention of Canada and Canadian companies on a given region or country.				
Your association is willing and in position to participate more actively in coordinating activities usually managed by governments, such as trade missions, trade fairs and Team Canada activities.				
Your association is able to work with DFAIT and Industry Canada to develop Canadian approaches to these markets.				
Your association would like, and would be able, to play an official role in strategies to promote international business development.				
Your association conducts numerous activities that complement the government's diplomatic efforts.				
It would be necessary to set up a platform of productive exchanges and/or to establish a common secretariat between bilateral councils.				
Your association conducts activities that overlap with government services.				

37. Have you identified services provided by the government to the business community that could become revenue-generating services for your association? If yes, please specify.

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

Other \_\_\_\_\_

38. Would you be interested in having DFAIT establish in its Web site a link to your association's Web site?

\_\_\_\_\_

\_\_\_\_\_

## *Suggestions for Starting Associations*

39. What would be the 5 best suggestions you would give a group that is starting a new bilateral commercial association?

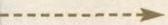
i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

iv. \_\_\_\_\_

v. \_\_\_\_\_





May 3, 1999

Dear Sir or Madam

The Export Services - Small and Medium-Sized Enterprises Division of the Department of Foreign Affairs and International Trade invites you to participate in a survey of bilateral trade associations. As part of our efforts to work in partnership with the private sector, we want to learn more about the activities of associations strongly oriented toward international trade.

The purpose of the enclosed survey is to provide us with an initial profile of:

1. your association;
2. its members; and
3. its contact with the Department of Foreign Affairs and International Trade and other government agencies.

The information gathered will remain strictly confidential. A future published report will include a quantitative analysis of typical profiles (mandates, activities, barriers, results, operating method, etc.), without directly identifying any specific association. A database will be created for internal use from the overall results.

The final results analysis will be used for the following specific purposes:

1. to generate good ideas and solutions for associations and the Department;
2. to facilitate subsequent communication and partnership phases; and
3. to gain greater visibility for association activities and results, for example by creating links between the departmental web site and the sites of associations responding to the survey.

The survey will take 40 to 60 minutes to complete. If you would like further information, do not hesitate to contact Ms. Julie Cavanagh, Project Manager, at (613) 996-4785. Please return the survey, by May 21<sup>st</sup>, 1999 to her attention, sending it by fax to (613) 996-9265, or to the following address:

Department of Foreign Affairs and International Trade  
Export Services for Small- and Medium-Sized Enterprises (TSME)  
Tower C, 5<sup>th</sup> Floor  
125 Sussex Drive  
Ottawa, Ontario  
K1A 0G2

Thank you in advance for your interest in this project.

Yours sincerely,

Roger Ferland  
Director General  
Trade Commissioner Service  
Overseas Programs and Services

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