Market Chain Enhancement MarChE Project

Report of the baseline study on the tourism sector North Department of Haiti (Cap-Haitian)

December 2009

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Acronym List

#	Number
%	Percentage
ATH	Association Touristique d'Haiti
BDS	Business development services
CCI	Comité consultatif international
CNFA	Citizen Net work for Foreign Affairs
ID	Identification
M&E	Monitoring And Evaluation
MarChE	Market Chain Enhancement Project
N	Number of Observation
NT	Non-targeted
SMEs	Small and Medium Enterprises
SPSS	Statistical Package for Social Science
T	Targeted
TOC	Taux d'Occupation
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development

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Summary

Tourism is one of the most important value chains that provide Haiti large income in last centuries. Nowadays, the sector has very declined because political instability situation in the past. Since Haiti is called to change her international dramatic sight, some important action has to take place seriously in that sector in order to have situation improved.

In this vein, MarChE intends to provide a large of useful financial assistance and business development service to individuals or group of persons involved in that sector.

Therefore, it is more than useful to set up a baseline document to see what the situation is like at the current time, and what it could be in the future. So, the baseline study is a helpful document which provides important information on area targeted for intervention before get starting with any activity in order to measure change occurred by this project.

Two groups were defined by this study. Regarding to the results, the average of sale for new nontraditional commodities and/or products in the non-agricultural sector is 46,772 Gourds for targeted enterprises and 26,722 Gourds for the non-targeted one. For the exportation of traditional commodities and/or products in non-agricultural sector, the average is 1.317,478 Gourds for the targeted group and 752,726 Gourds for the non-targeted group. The average of sales of supported market chains to the tourism sector is 200,252 Gourds for the targeted (Coffee 32.897 Gdes, Banana plantain 28.316 Gdes, Rice 32.940 Gdes, Vegetables (carrot, tomatoes, lettuce ….) 138.997 Gdes) and 114,412 Gourds for the non-targeted one (coffee18.795 Gdes, Banana plantain 16.178 Gdes, Rice 18.819 Gdes, Vegetables (carrot, tomatoes, lettuce ….) 79.414 Gdes.)

Those supported market chain are mainly coffee, rice, and plantain. Moreover, 33.3% of those enterprises are reporting increases in sales and cost reduction. 21.30% are targeted and 12 % are not. Among those targeted enterprises, only one has developed a new product. Regarding demand-driven development service, 10 enterprises of the targeted have expressed demand-driven service and 1 one the non targeted one.

Information provided as a result of this study let stakeholders, both donors and partners to have a see on the situation of the Tourism sector in Haiti as in the following table:

ID indicator	Indicators title	Baseline Value (Dec 09)	
		T	NT
1.3	Sales and exports for new nontraditional commodities/products in non agricultural sector[1]. *Average in Gourds (N=33)*	**467.72**	**26.722**
1.4	Sales and exports for traditional commodities/products in non-agricultural sector[2] (*Average in Gourds (N=33))*	**1,317.478**	**752.726**
1.9	Sales of supported market chains to the tourism sector (*Average in Gourds (N=144))*		
	· *Coffee*	**32.897**	**18.795**
	· *Banana plantain*	**28.316**	**16.178**
	· *Rice*	**32.940**	**18.819**
	· *Vegetables (carrot, tomatoes, lettuce ….)*	**138.997**	**79.414**
2.1	% of SME targeted reporting increase in productivity, reducing of cost or increased profit as a result of technical assistance	**21.30%**	**12 %**
2.3	# Of new products/services developed by SMEs.	**1**	**0**
2.6	# of SME s using demand-driven business development services	**10**	**1**

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[1] Please refer to the definition of new nontraditional product in the tourism and handicraft sector in the draft report of the baseline study on tourism

[2] Are considering for traditional products in the tourism sector, all elements that enterprises in that sector can provide to its clients in specific time, regarding the definition of Marie-Andrée Delisle mentioned in the Draft report. All sales in the tourism sector which does not regard new nontraditional product, concern all traditional product in that sector.

I. INTRODUCTION

During the last two centuries, Haiti was, by its touristic potential and climate, agricultural resources, the "Pear of the Antilles". Those potentialities have been dramatically damaged by political instability and civil unrest. However, Haiti, though its historical origins as a slave colony, voodoo practices which are regionally distinguishing characteristics that provide unique tourism opportunities, has great opportunities to develop a variety of unique tourism products and could be one the best tourism leader in the Caribbean's region.

Nowadays, Haiti is called to implement specifics actions in order to improve its international views by promoting and strengthening its tourism sector. In this section, the MarChE project, in tourism sector, intends to nurture tourism promotion opportunities by providing Quality Seal Program, Investment Facilitation, and Attractions Development and training for hotels, for Tour guides and market places travel wholesalers promote events in Diaspora communities, offering event organizers technical support and so forth.

Thus, it is very important to the MarChE team to conduct a reliable study in order to provide a clear assessment of the current state of the sector, which could be served as basis of comparison. This paper will lead to a better understanding of the context of this study, the methodological approach adopted and the current state of this sector.

I.1.-Context and justification of the baseline study

MarChE is implementing an important component program in the tourism sector specifically in the North region. Tourism initiatives supported by the project include Quality Seal Program, Investment Facilitation, Attractions Development, and training for hotels, for Tour guides and market places. The outcomes for Small and medium enterprises assisted are expected to increase their revenue, to improve the quality services, business linkages with local farmers, and to increase the number of tourism in the region.

This study will provide to the partners and the donor a good knowledge of the starting point of the project in various implementing aspects. Relevant information at the beginning is critical to assess further the performance of the project strategy and to correct gaps in the execution process toward tangible objectives expected. The results of the baseline study will serve as a main reference to evaluate periodically the performance of the project in the immediate area of the intervention. The baseline will permit knowing whether the project has met its targets, to compare regularly the performance of the project to the previous period and to analyze further the relative impacts of the project on the beneficiaries.

In order to analyze further change induced by the project, the baseline study will be conducted on potential beneficiaries with basic questions touching:

a) The profile of the enterprises targeted by MarChE

b) The current income of the Small and Medium Enterprises (SME) in the tourism sector

c) The level of demand of the SME targeted for some agricultural products

d) The type of technical assistance received by the enterprises

This baseline will provide a basis for comparison in order to analyze further the progress toward the objective results planned, to explain why results has been positive or negative and to identify what changes are needed in order to reinforce project impact. The study should provide a widely range of information on:

1. The percentage of increased sales and exports for new nontraditional commodities/ products in non-agricultural sector, that is to say, Products that will be defined in art, music, craft, and tourism.
2. The percentage of increased sale and exports for traditional commodities/products in non agricultural sector
3. The percentage of increase in sales of supported market chains to the tourism sector
4. The percentage of SME targeted reporting increase in productivity, reducing of cost or increased profit as a result of technical assistance
5. The number of new products/services developed by SMEs
6. The percentage of increase of SME s using demand-driven business development services

I.2.-Description of CNFA/USAID MarChE Project regarding the tourism sector

In the context of the tourism sector of Haiti, MarChE Project experts to work with local stakeholders to create a new and vibrant image of the country so that the negative portrayal of those last years of Haiti in the media, due to political instability and insecurity, can be replaced. To reach the aims targeted, the Team of MarChE intends to conduct subsequent activities in the North that has the potential to appeal to a more diverse group of tourism.

The main strategy advocated by the MarChE Team focuses on the increase sales and investment earning in the tourism sector through support to local initiatives and with coordination with the agribusiness and handicraft sector. At this stage, the MarChE Team intend to give priority to two areas of activity which are concerning building capacity and increasing Haiti's visibility in appropriate markets for sales and investment.

As far as the capacity building and market readiness are concerned; the MarChE Team intends to support the tourism sector by providing Business Development Services and financial Investment Service, to individuals, enterprises and local industry associations and business support organizations, which can both receive program assistance to enhance their internal membership building and strategic planning, finance and operations, outreach marketing, and serve as partners in delivering services.

II. Methodological approach

II.1. - Study area

The main study area of the baseline is the North department of Haiti (Cap-Haitian), where predominate special attractions such as monuments, historical and natural beauty sites such as Citadel, Palace of Sans Souci, and beautiful beach such as Labadie, Cormier. For each area, data have been collected in order to reflect what the current state of the tourism sector is.

This approach offers to the baseline study team great opportunity to get more available information on functioning of this sector.

II.2. – Census Units for the baseline study

In this study, the survey units are SMEs in the tourism sector targeted for assistance by MarChE mainly located in the North. Those SMEs may be Hotels, restaurants, beaches, travels agencies, tours operators, artisans associations and shop, and so one. They are considered for their specifics contribution to touristic activities development in the North department of Haiti.

In our approach, any individual conducting any activity generating profit is an entrepreneur. Thus, SMEs could be individuals, individuals groups and associations groups that could have any activity from which profit can be generated.

The best used way for data collecting from those SMEs, is a simple questionnaire addressed to every SMEs ATH Nord members and others SMEs which are not ATH Nord members, but operating in tourism in the North department of Haiti. A list of those enterprises is included in the following title.

Please find in the list below the enterprises that are targeted for the survey.

Enterprises	ID	Targeted for assistance (T)	ID	Non targeted for assistance (NT)
Hotels/Guest House	1	Hostellerie du Roi Christophe	1	Hotel Congo
	2	Hotel Mont-Joli	2	Hotel Eugene & Sons
	3	Auberge du Picolet	3	Hotel Dieu qui donne
	4	Residence Pauline	4	Hotel incontinental
	5	Residence Royale	5	Hotel le Voyageur
	6	Hotel Beck	6	Hotel Pension
	7	Hotel Beau Rivage	7	Christian Guess House
	8	Pension Bel-Air	8	Hotel Dye ki bay
	9	Les Jardins d'Arceaux	9	Kaina's Hotel
			10	Rachek Hotel
			11	Bonte Jean Florencia
Travel agency	1	Voyage Plus		
	2	Mon Voyage		
	3	Pro Gaz		
Tour Operator	1	Taino Tours S.A.	1	Antilles Tours
	2	Hispaniola Tours	2	Conrad Tours
			3	Hans Tour
			4	Amiga Island Tour
Restaurant	1	A & J restaurant		
	2	Lakay restaurant		
	3	Mini-delices		
Beach	1	M&M Beach Resort		
Car Rental	1	Royal Rent-a-Car		
	2	Reference Car rental		

Enterprises	ID	Targeted for assistance (T)	ID	Non targeted for assistance (NT)
Total	21		15	36

II.3.-Data collection

Regarding the size of the survey units submitted by the Tourism coordinator, it is too small to build a random sample, thus we find that it is beneficial for this study to consider all the units for this survey. We see fit also to construct a control group to better appreciate the real impacts of the project in that sector. This approach is adopted in order to make comparison easier as possible as that could be. MarChE intends to work only though 21 SMEs in the tourism sector in the North department, and then to this list, 12 others SMEs operated in the tourism sector in that department were considered to constitute the control group.

Since we have considered all the units, some statistics tests are not anymore important or are useless for results interpretation and analysis.

However, it is beneficial for the baseline study team to ensure the quality of the results by testing relations between variables so that the real effects of variables on each other can be appreciated.

The data collection process has been assured by a group of three surveyors under the supervision of a consultant, who has to ensure the quality of all information collected on the field, coordinate the activities of the surveyors by providing to all of them a close assistance in order to facilitate the data collection process. The survey has lasted four full days. Information has been collected in several part of the department such as: Milot, Cornier, Labadie, and Ville du Cap where some SMEs have been met and surveyed at ATH Nord.

Our way and strategy of data collection have based on a questionnaire addressed to all SMEs that should be interviewed. The questionnaire is structured into two parts:

a) General questions on SMEs

b) Specifics questions according to the types of SMEs

While we wanted to survey 36 enterprises, only 33 enterprises in the list below have been ready and willing to provide some information and our analysis will focus on data collected from those enterprises.

III.-Data analysis and report

Our data analysis will be based on an indicator prior approach. We intend here to show how the current state of SMEs in the tourism and Handicraft area of the project are characterized, regarding increase in sales, linkage between enterprises, new products and services developed, demand driven development services, and so one.

Data for this study have been analyzed with Statistical Package for Social Science (SPSS 17.0). However, some graphs have been designed on Excel that offers a better view and modifications for a better understanding.

In this part of the study, we aim to meet the purpose of MarChE for all targeted indicators for this section. Thus, as it is said before, our approach gives priority to indicators that are in the list of targeted indicators (appendix # 2). The results will be presented and analyzed following the range of importance of those indicators for a better appreciation of the impacts of the project. Results are presented here in several tables before setting up any data analysis and further information regarding all variables under analysis are given in the appendixes mentioned at the end of every table title.

III.1. -General Overview of the current state of enterprises surveyed (Appendix #0)

- **Number and type of enterprise surveyed per group.**

In general, among enterprises surveyed, we have found 17 hotels, representing 51.51 % of the total of enterprises interviewed; 4 bar & restaurants, representing 12.12 % of the total of enterprises surveyed, 4 handicraft shops and artisan associations, representing 12.12 % of the total the enterprises surveyed, 1 car rental company, 4 travels agencies and 4 tours operators, representing respectively 3, 03 %, 9.09 % of the total of enterprises interviewed. Among the hotel group, only five are legally recognized by the Haitian tourism responsible, while all of them are medium enterprises. Bar and restaurants are all small and medium enterprises, 50% of them are legally recognized. In short, only 15 of the enterprises surveyed are legally recognized

Table # 0: Number of enterprise surveyed per group and their characteristics.

Group of enterprises	Number	Legally recognized *(Approximately)*	Number of employees		Type of enterprises**[3]	Weight in the total of enterprises surveyed
			Min	*Max:*		
Hotels & all lodging institutions	**17**	5	*1*	*100*[*4]	Medium	51.51 %
Bar & restaurants	**4**	2	*2*	*28*	Small- Medium	12.12 %
Handicraft shops and artisan associations	**4**	1	*0*	*8*	Small	12.12 %
Car rental company	**1**	1	6		Small	3.03 %
Travels agencies	**4**	3	*0*	*10*	Small	12.12 %
Tours operators	**3**	2	*0*	*5*	Small	9,09 %
Total	**33**	15				100 %

Source: Survey conducted on December 2009

[3] **The type of enterprises specified in that section refers to the classification of enterprises by their characteristics adopted by Cotter James (see appendix II).**

- **Level of formalization of those enterprises**

Regarding the formalization and the status of those enterprises, 61.2 % of bar & restaurant, 31.8 % of hotels and all others lodging institutions, 71.4 % of the travels agencies and 85.7 % tours operators are family enterprises which have legal recognition. For handicraft shop and artisan associations, 5.3 % are household-owned enterprises that have legal recognition and 15.10 % do not have any legal recognition.

In the contrary, 57.1 % of the hotels & all others lodging institutions, 14.3% tours operators; 28.6 % travels agencies and 100 % car Rental Company are collective enterprises which have legal recognition. However, 14.3 % of hotels that are collective enterprises do not have any legal recognition.

- **Financial system of those enterprises**

According to the financial system of those enterprises, for a total of 33 enterprises surveyed, 10 of them, representing 30.3 % do not have any accounting document or cash flow accounting, and formal documentation; 8 of them representing 24,2 % have confirmed that they have a basic accounting system ; 8 else of them, representing 24.2 % affirmed that they have a accounting system and records in place and payroll or personnel system and 7 of them, representing 21.2 % have reported that they have accounting systems and financial records maintained, planning and management reports also in evidence.

Table # 1: Biggest needs of the enterprises per group

Biggest needs expressed by enterprises	Group of enterprises												Number of enterprises	
	Hotels & all lodging institutions		Bar & restaurants		Handicraft shops and artisan association		Car rental company		Travels agencies		Tours operators			
	T	NT	T	NT	T	NT	T	NT	T	NT	T	NT	T	NT
Web site Development	4	2	0	1	0	0	0	0	1	0	0	1	5	4
Management	2	1	1	1	0		0		0		0		3	2
Accounting system	1	1	0	1	0		0	1	0	0	0	0	1	3
Infrastructure	1	4	0	0	1	0	0	0	0	1	0	1	2	6
Technical Assistance	1	0	0	0	0	1	0	0	1	0	0	0	2	1
Financial system	1	0	0	0	1	0	0	0	0	0	0	1	2	1
Human Ressources	0	0	0	0	1	0	0	0	0	0	0	0	1	0

Do not know	0	0	0	0	0	0	0	0	1	0	0	0	1	0

Source: Survey conducted on December 2009

Furthermore, it is beneficial for this study to claim data on major problems and needs of those enterprises. First of all, most of those do not have any employee. In fact, 12.1 % of the totals of enterprises surveyed have responded that they do not have any employee. The average number of employee of those enterprises surveyed is less than 13, with a standard deviation of 18 employees in the last twelve months. However, it is very important to note that some of those enterprises affirmed that they have more 100 employees. In the case, 3 % of the total of enterprises interviewed have confirmed that they 100 employees.

Second of all, most of them face serious problem of lack of technical assistance. On a total of 33 enterprises, more than 54 % affirmed that they do not have benefited any technical assistance in the last twelve months, while their biggest problem is site web development. Approximately 15.2 % of the enterprises interviewed affirmed that they need technical assistance in site web development in order to insure the promotion of their products and services.

Finally, some of them, 48.5 %, affirmed that, whether assistance was provided, they do not find any application of that assistance to improve the quality of their product or services. Therefore, for them, that king of assistance does not fit their, and it is inapplicable.

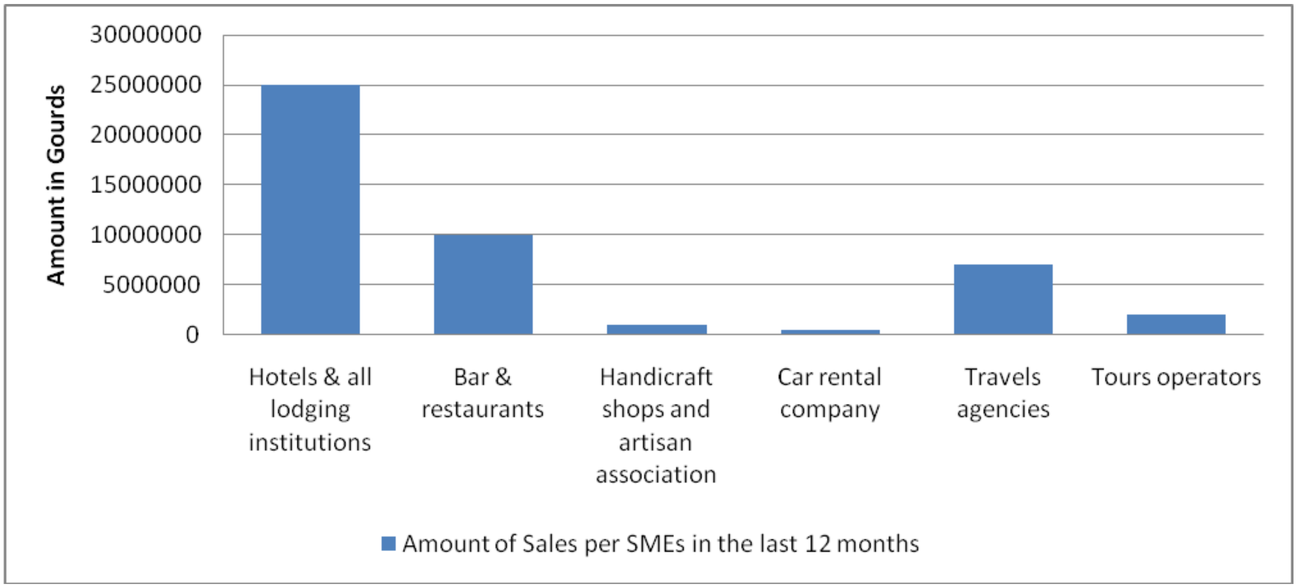
III.2.Current state of enterprises surveyed

For a better understanding, we come up to remind that enterprises surveyed for this study were hotels & all lodging institution, Bar & Restaurant, beaches, Travels agencies, Tours operators and some artisans associations in handicraft. Each type of those enterprises has been considered as group for analysis.

It is clear to be observed that the trend sales for the hotels group are not homogenous. Representing 18.2 % of the total of all enterprises surveyed, Hotels & all lodging institution have a significant trend sale. That sale trend ranges from more than 5000000 Gourds to less 30 000000 Gourds in the last 12 months. The major portion of those amounts, 72 %, results from goods and services sold on the international market, even though costumers have acquired them on the territory of Haiti. However, more than 28 % of those amounts come from goods and services costumed by local and national habitants.

Bar & Restaurants, Tours operators, artisans associations, car rental and Travels agencies representing respectively 3 %, 6.1 %, 9.1 %, 3 % and 12 % of the total of enterprises surveyed, have a trend sale ranges from less than 5000000 Gourds in the last 12 months. For more than one, this reflects the enormous lack of financial resources in the tourism sector in these recent years.

Graphic #1: Sales per SMEs in the last 12 months



Source: Survey conducted on December 2009

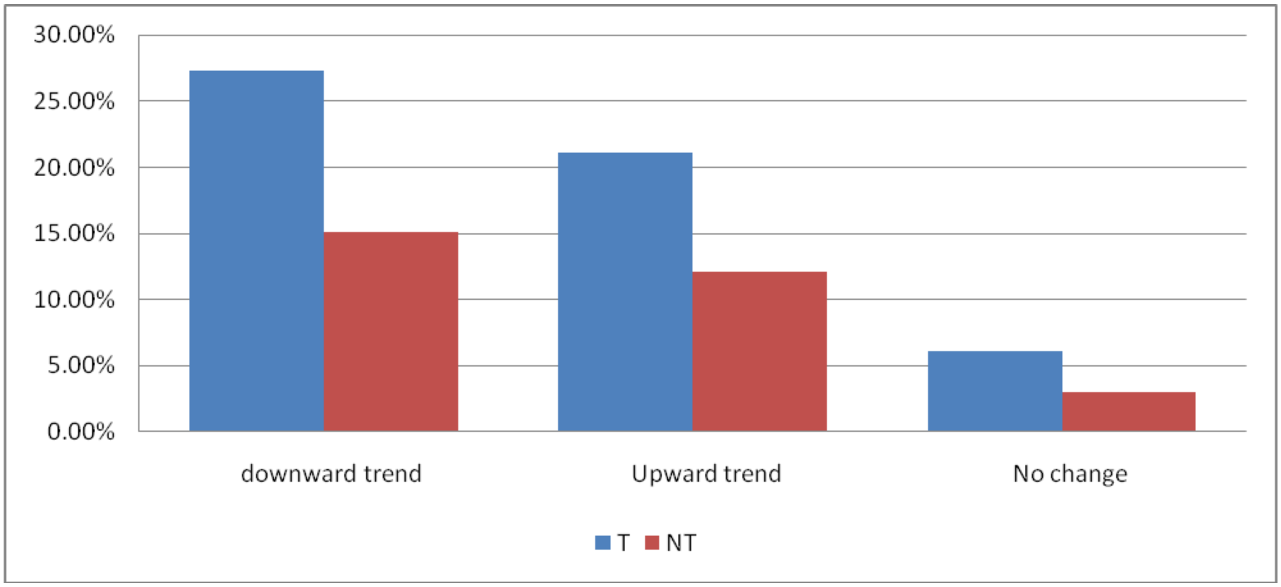
III.2 Increase in productivity, reducing of cost or increased profit as a result of technical assistance

Regarding the trend for enterprises reporting increased profit, we focus on three kind modifications. For an upward trend, 33.33 % of the total of enterprises interviewed have reported positive trend of change in sales or in profit. Among those enterprises, 18.2 % have affirmed that they have not benefited any technical assistance in the last twelve months. However, 15.2 % of those enterprises have reported that their upward trend in their profit in the last twelve months result from technical assistance benefited.

In the contrary, for a downward trend, 42.4 % of the total of enterprises surveyed, either targeted or non-targeted has affirmed a negative trend of change in their profit in the last twelve months. Among those enterprises, 21.2 % have affirmed that they have not benefited any technical assistance in the last twelve months. But, while they were unable to record positive change in their profit trend in the last twelve months, 21.2 % of those enterprises have benefited technical assistance in the same period of time.

Furthermore, 9.1 % of those enterprises surveyed have affirmed that they have not recorded any change in their profit trend in the last twelve months. Among those enterprises, 6.1 % have confirmed that they have not benefited any technical assistance during the same period of time, but 3 % of them have confirmed that they have benefited technical assistance ***(See Graphic #2).***

Graphic #2: Percentage of SME targeted reporting increase in productivity, reducing of cost or increased profit as a result of technical assistance. (Appendix #0Table #2)

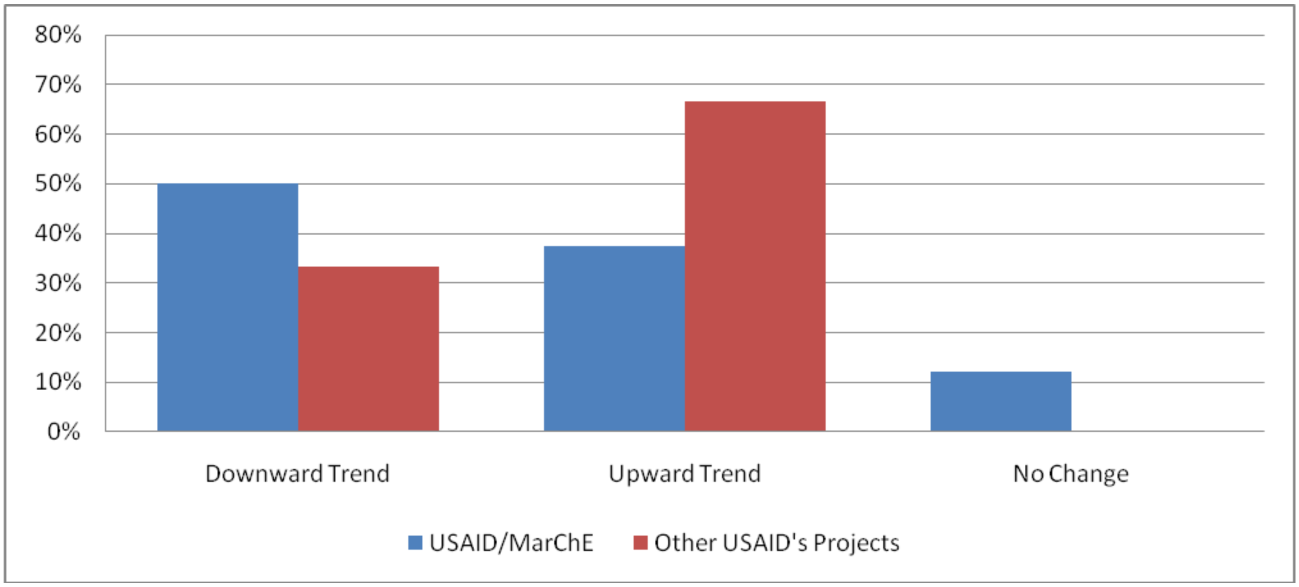


Source: Survey conducted on December 2009

In addition, it is beneficial to this study to specify which institutions are the main providers of technical assistance for those enterprises. In fact, 37.5 % of those enterprises that have affirmed a positive profit trend in the last twelve months have shown that the assistance benefited was provided by USAID/MarChE in the last. However, 50 % of those enterprises that have reported a negative trend in their profit change, while benefiting technical assistance in the last twelve months and 12.5 % of those enterprises which have reported any change in their profit trend, have affirmed that the assistance benefited was provided by USAID/MarChE.

Nevertheless, USAID/MarChE is not the only technical assistance provider identified by the enterprises interviewed. Association Touristique Nord and other USAID's projects are currently identified by the enterprises surveyed as technical assistance providers. In fact, 33.33 % of those enterprises which reported a negative profit trend in the last twelve months and 66.7% of those that have confirmed a positive profit trend in the same period of time have affirmed that their assistance was provided by other USAID's projects ***(See Graphic #3).***

Graphic #3: Percentage of SMEs Receiving Technical Assistance and sources of Technical Assistance per trend



Source: Survey conducted on December 2009

III.3. Using Demand-driven business development service

By business development services (BDS), we mean services such as training, technology transfer, marketing assistance, business advice, mentoring, and information, which are aimed at helping small and micro entrepreneurs improve the performance of their businesses. Business development services have traditionally been called non-financial services, and are sometimes offered in conjunction with credit and other financial services

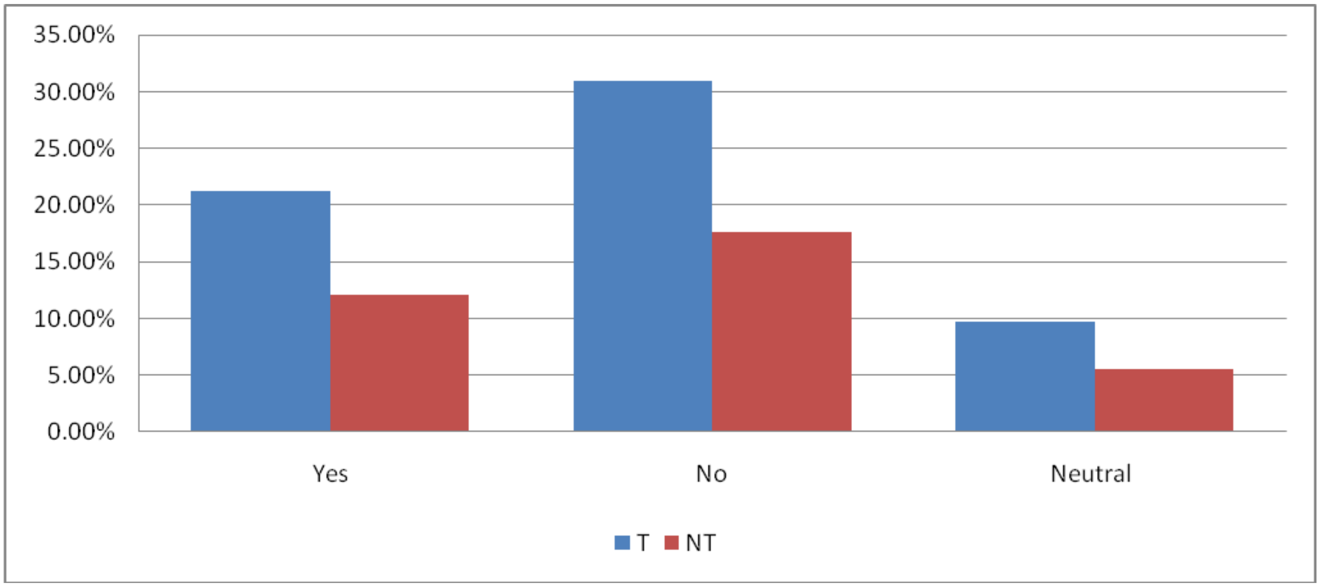
The demand-driven business development service approach is a participatory method comprising of situation and problem analysis and action planning (one month) and the implementation of services to overcome the identified business constraints (five months). The business owners are assisted by BDS facilitators of partner organizations to identify their main business constraints and to suggest own solutions. The BDS facilitator assists them with refining the owners' proposals and forwards additional problem-solving service interventions in collaboration with BDS providers.

This approach will allow us identifying SMEs potentiality and weakness; and as a matter of fact they could be better assisted.

Regarding demand-driven business development service, 33.33% among the enterprises interviewed, both targeted and non-targeted, have responded positively that they use this kind of service. In the contrary, 48.5 % have affirmed that they do not use Demand-driven business development service. For those enterprises affirming the use of demand-driven business development, they have been unable to give convincing information on the kind of demand-driven business development service providers that they link with.

Furthermore, more than 15 % of the total enterprises surveyed, targeted and non-targeted do not give any information on demand-driven business development service. Thus, they do not find any application of that service to their needs, or that services do not fit their expectable needs in the last 12 months ***(See Graphic #4).***

Graphic #4: Percentage of SMEs answering for using demand-driven service



Source: Survey conducted on December 2009

Among the enterprises using demand-driven business development services, most of them are Hotels and others lodging institutions which represent 18 % of the total of enterprises using demand-driven business development service, Bar & restaurant. *As a matter of fact, demand-driven business development service is one of the biggest needs of the enterprises involved in the tourism sector in the north department of Haiti.*

III.4. New products and Services developed by SMEs

As far as this study is concern, new products are products which have never been developed before, or which have been developed in other shame during the period of time preceding the last 12 months. It may be a minor or great variation on an existing brand, a true product innovation, or an imitation of a product already on the market. New product development is necessary to maintain market share because demand for most brands or products tends to decline over time.

In this study, MarChE expects to see whether enterprises are used to developing new products. The foundation of the study will give birth to better strategy to assist properly those enterprises that have neither developed or not new products in the last twelve months.

According to this definition of new products developed, only 3 % of the total of targeted enterprises surveyed responds positively. That new product developed regards to enterprises providing service of restoration. Bar & restaurants are such kind of enterprises which have declared the development of a new product in the last 12 months. Therefore, only one new product has been developed by Bar & restaurant during the last twelve months. However, this product was not clearly specified, even though, enterprises grouped under the heading Bar & restaurant claimed to good manner to fit the aim of their cliental.

Some of those enterprises have already benefited from MarChE technical assistances, and thanks to the kind of technical assistances benefited, they have taking advantage to give to their client a better service. (See appendix #1, table

For others enterprises concerning by this study, regarding new products developed, 97 % of the total, either targeted or non-targeted have responded negatively about the development of new products. In this group of enterprises are counted Hotels & all others lodging institutions, travels agencies, tours operators, car rental, beaches, and so one.

III.4.1. New Service developed by SMEs

According to this study, new services are Services which have never been either developed or provided before, or which have been developed and provided in other shame during the period of time preceding the last 12 months.

MarChE aims to provide to individuals and enterprises operating in the tourism sector, business development services and financial development service so that they can be more capable to provide appropriate client services and to develop new, targeted products and services in responses to member needs.

The result of this study will lead MarChE to better appreciation of new service developed by enterprises and to set up a better assistance plan for those enterprises.

According to this definition of new services developed, only 3 % of the total of targeted enterprises surveyed responds that they do not have any information about new services development. For those enterprises, the concept of new service is very new. Thus, that is the first time they hear about that concept.

For others enterprises concerning by this study, regarding new services developed, 97 % of the total, both targeted and non-targeted enterprises have responded negatively about the application of the development of new services. In this group of enterprises are counted Hotels & all others lodging institutions, travels agencies, tours operators, car rental, hotel and restaurant.

They do not find any application of the development of any new service in their effort to fit the needs of their clients.

Many specifics reasons have been evoked by those enterprises to specify why they do not develop any new product and service in the last 12 months. The most common reasons evoked are lack of technical assistance, and financial means, training non-fitting needs of enterprises, financial problems, and so forth.

Regarding the absence of financial means, 3.1 % of the total of targeted enterprises surveyed have responded positively that they have not developed any new product and service, for their financial means do not allow them to do so. For lack of technical assistance, 6.3 % of the total of enterprise justifies their incapacity to develop new product and service because they do not receive a significant technical assistance. Plus, more than 16 % of the total of those enterprises respond that their biggest problem concerning the development of new products and services is mainly financial assistance.

III.5. Increase in sales of supported market chains to the tourism

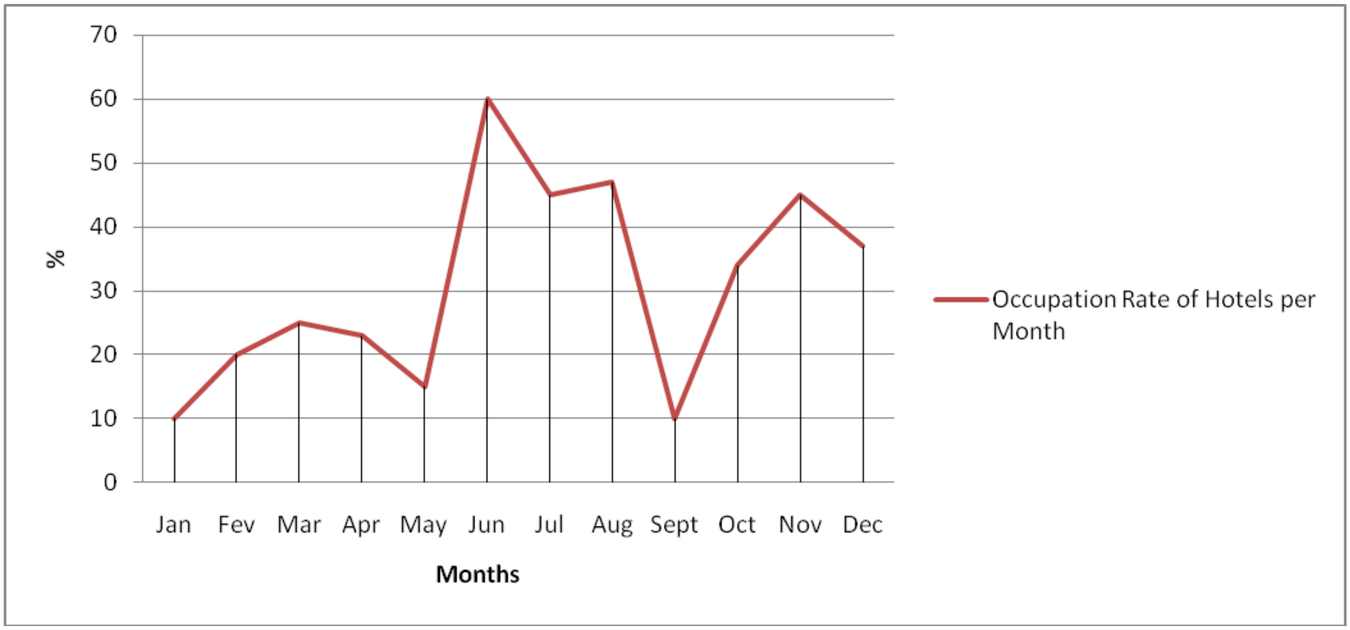
The enterprises heading under the group Hotels & all lodging institutions, in the last twelve months, have sold more than 1468 nights and an average of 110 nights for an amount more than 1,500,640 Gourds and an average of 2,200,503.76 Gourds, with a standard deviation during the last twelve months of 318,778.756 Gourds. The travels agencies have sold more than 700 tickets and an average of 17.77 tickets which provide an amount of more than 1,500,640 Gourds and an average of 220,503.76 Gourds. The tours operators have organized in the last twelve months more than 12 tours for more than 840 visitors in the same period. This critical situation may be explained by, according to those institutions, lake of financial means.

III.5.1. Occupation rate of Hotels

Regarding the occupation rate of Hotels, it is an indicator that takes into account the numbers night sold and the number hotel's rooms available during the twelve months of the year. The calculation process emphasis on this formula: *TOC= Number of night sold in the last twelve months *100 / Number of hotel's room available for the last twelve months*

There are two most important peaks of Hotels' occupation rate during the last twelve months. The first one (60%) is between May and June, and the second one (49%) between July and August. These peaks could be explained by the Haitian vacation period which general extend from June to August. During this period, Haitian hotels, mainly in the north receive generally most guest. The lowest TOC is registered during October to January. The raison might be explained by the reduction of the presence of tourism in the area of study in the department.

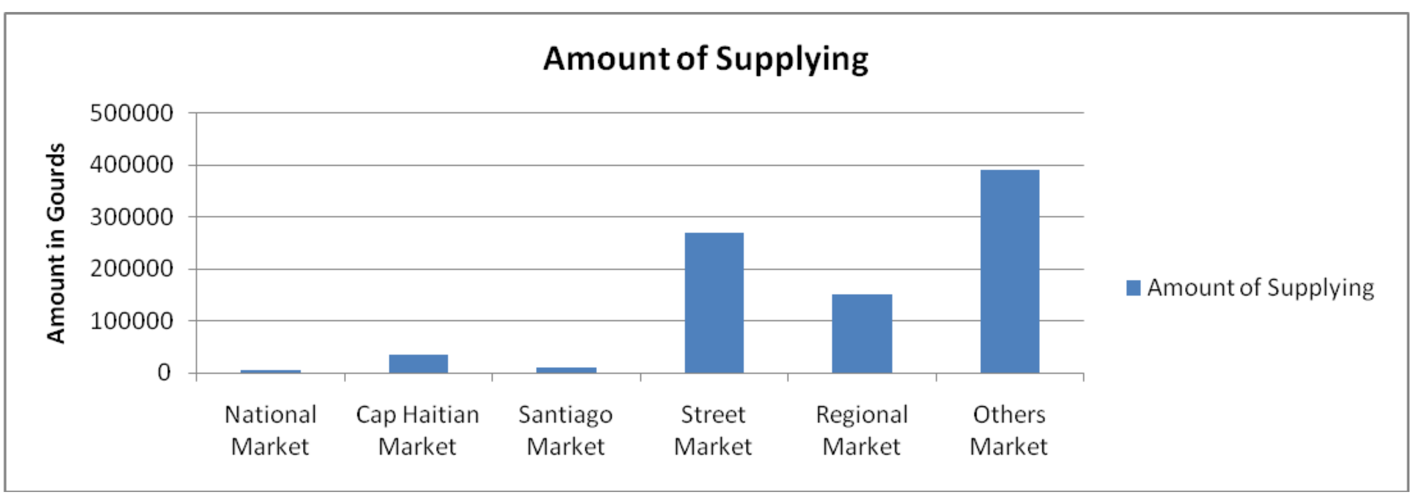
Graphic #5: Occupation Rate of Hotels and all lodging Institutions per month



Source: Survey conducted on December 2009

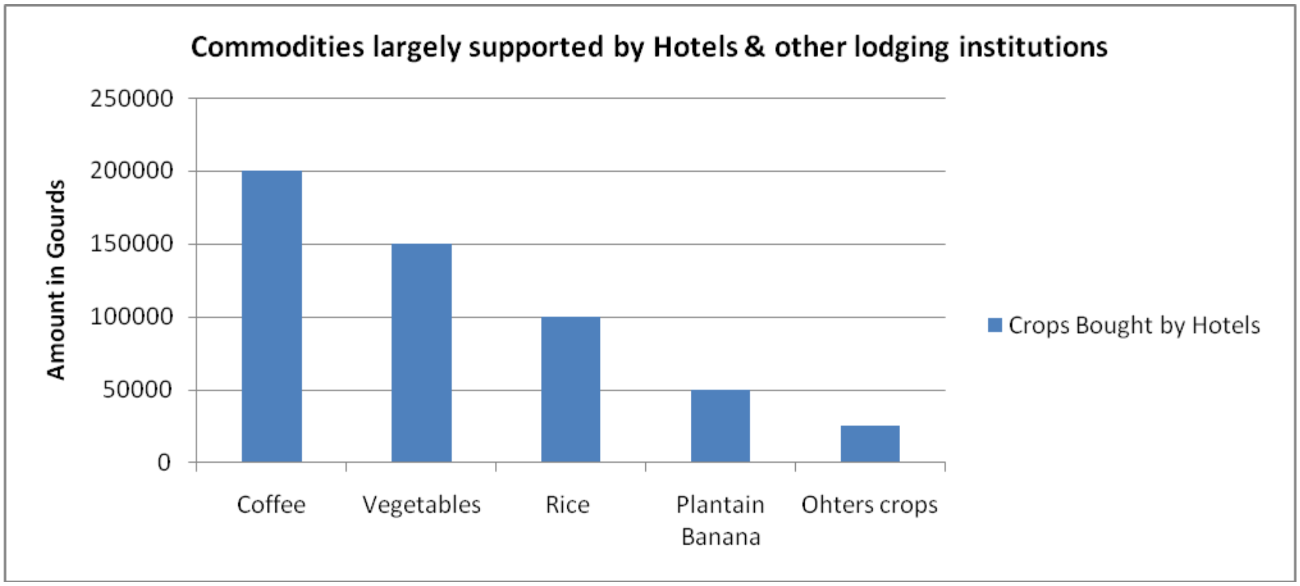
The group of hotels & others lodging institutions and Bar & Restaurant have a great influence on the national market for regarding some specific commodities. Most of their crops are bought on "Marché Cap Haitian" for an amount of 350,000 Gourds and on the street market for an amount of more than 250,000Gourds.

Graphic #6: Supplying Market of SMEs



Source: Survey conducted on December 2009

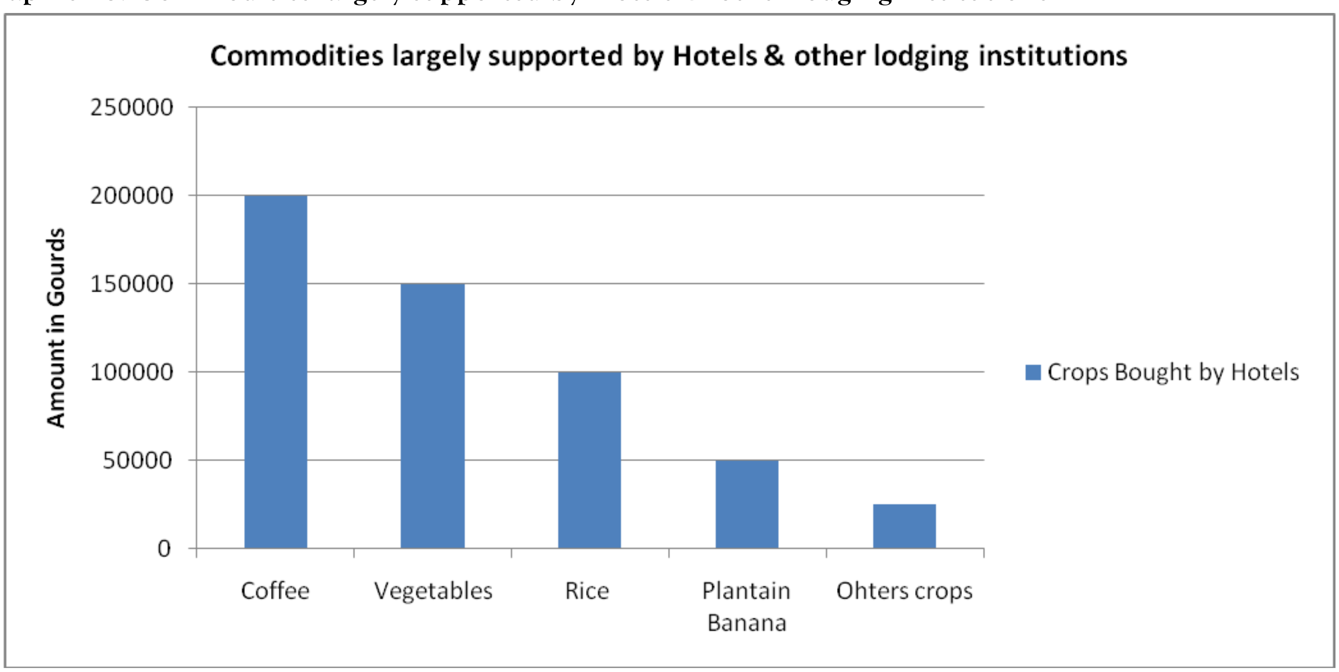
The rate is different from Hotels and Restaurant because each of them has preference for commodities. In this case, coffee is larger supported by hotels and all lodging institution than vegetables, rice and so one. However, Vegetables and rice are very supported by Restaurant



Graphic #7: Commodities largely supported by Hotels & other lodging institutions

Source: Survey conducted on December 2009

Graphic #8: Commodities largely supported by Hotels & other lodging institutions



Source: Survey conducted on December 2009

Regarding the income per month of Hotels and others lodging institutions allow us to understand that the tourism sector could be a significant driver of economic and social development if it is addressed through a comprehensive approach with locally appropriate and targeted assistance.

To do so, actions can focus on sales and investment earning in the tourism/hospitality sector through support to local initiatives and in coordination with the agribusiness and handicraft. Difference can also be made by providing to those institutions and associations appropriate client services and helping than to develop new products and deliver improved tourism services with standard quality

As far as Hotels are concerned, most important peaks are observed in March and in July (2500 0000, 3 000000 Gdes).

Those figures demonstrate the hotel branch can be used to accelerate de development process in the tourism sector in Haiti.

III.6. New nontraditional commodities/ products in non-agricultural sector

- **Specification of traditional and new nontraditional commodities/ products in non agricultural sector**

It is beneficial for this study to specify what we intend by handicraft, traditional and nontraditional products in the artisanal sector.

According to ***UNESCO/CCI , October 1997***[5] ,the term handicraft designs products made by artisans, either completely by hand or using hand tools or even mechanical means, provided that the direct manual contribution of the artisan remains the largest component the finished product. These products are produced without restriction in terms of quantity and using raw materials from sustainable resources. The special nature of artisanal products derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, cultural, decorative, functional, traditional, symbolic, and important point of view religious or social.

- **Enterprises reporting increase in sales and supported market chains to the tourism sector (Appendix #0Table #6)**

We have to note here that all enterprises surveyed, either targeted or non-targeted have reported that they have not developed any new products or any new nontraditional products in the artisanal sector. Enterprises

[5] UNESCO/CCI, Manille , October 1997

heading under the artisanal association group have represented only 6.2 % of the total of enterprises interviewed.

However, among those enterprises which are operating in the tourism sector, mainly grouped under the heading Bar & restaurant, 3 % have affirmed an increase in sale and export for their products developed in the last twelve months.

Therefore, at the present time, there is any new non-traditional product developed by SMEs that is sold and exported.

Then, it is very crucial that MarChE project aims to help these SMEs developing new non-traditional product and service so that they could better satisfy their clientele. As MarChE Project seeks to improve the quality and standards of tourism industry services and associated products, key areas of focus include international industry standards, safety, and quality principles, quality insurance management systems and so on should be reinforced by the project so that Haiti could be separated itself from all other potential tourist destinations. Therefore, it is an imperative for Haiti to develop a variety of new tourism products, which could reflect its culture and history.

Conclusion and recommendations

This study, conducted in the field of the MarChE project funded by USAID, aims to provide basic data on the tourism sector in the North department of Haiti (Cap-Haitian) so that this sector could be better assisted in the next years.

The approach followed in the case of this study is concentrated on indicators definition. Our value chain approach is to show how all activities taken in level of the value chain can affect all others stakeholders that involved in the sector's activities.

Since the project purpose is to claim positive change in that sector through specifics actions on specifics indicators.

We have divided our population into two groups: Targeted and non-Targeted groups. We have classified the surveyed elements in six groups: Hotels & all lodging institutions; Bar & Restaurant; Handicraft shops and artisan association; Car rental company; Travels agencies and tours operators.

Thirty-three enterprises have been interviewed. 36. 36 % percent of them are targeted for assistance and 63.44% are targeted. According to the result of this study, either targeted or non-targeted enterprises surveyed show great needs of urgent assistance even training, technical and so forth.

This situation is mainly dominated by weakness of those enterprises in Management, website development, accounting, and so on.

In addition, there is a great implication of consumption of those enterprises on the agricultural sector. In fact, they mainly acquire their commodities on the local and national market. An important assistant to that sector could really have an influence on the agricultural sector.

It is very urgent that MarChE brings to those enterprises an urgent helpful assistance in management, website development and management, in clientele, marketing, and so one, because great has been identified in those fields.

MarChE can also see how it can assistance those enterprises by linking them to potential international market so that they can sell easily they product.

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3. Européen Leader, La formation au service du développement territorial, *Guide méthodologique, décembre 2000*

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Appendix # 0

Comparison of sells with 12 last month * Benefiting technical assistance						
			Benefiting technical assistance			Total
			Non applicable	No	Yes	
Comparison of sells with 12 last month	Downward trend	Count	0	7	7	14
		% of Total	.0%	21.2%	21.2%	42.4%
	Upward trend	Count	0	6	5	11
		% of Total	.0%	18.2%	15.2%	33.3%
	Any change	Count	0	2	1	3
		% of Total	.0%	6.1%	3.0%	9.1%
	Non applicable	Count	2	2	0	4
		% of Total	6.1%	6.1%	.0%	12.1%
		Count	0	1	0	1
		% of Total	.0%	3.0%	.0%	3.0%
Total		Count	2	18	13	33
		% of Total	6.1%	54.5%	39.4%	100.0%

Table # 2: Percentage of SME targeted reporting increase in productivity, reducing of cost or increased profit as a result of technical assistance. (Appendix #0Table #2)

	Statistics	Frequency		Percentage		
		T	NT	T	NT	
Valid	downward trend	9	5	27.27%	15.13 %	42.4 %
	Upward trend	7	4	21.12%	12.09 %	33.3 %
	No change	2	1	6.06 %	3.04 %	9.1 %
	Non applicable	3	1	9.09 %	3.03 %	12.12%
	4	1	0	3 %	0.00	3.0 %
	Total	22	11			100.0 %

	Statistics		New Products developed		Total
			Non applicable	Restoration	
Current trend observed	Downward trend	Count	14	0	14
		% of Total	42.4%	.0%	42.4%
	Upward trend	Count	10	1	11
		% of Total	30.3%	3.0%	33.3%
	No change	Count	3	0	3
		% of Total	9.1%	.0%	9.1%
	Non applicable	Count	4	0	4
		% of Total	12.1%	.0%	12.1%
	4	Count	1	0	1
		% of Total	3.0%	.0%	3.0%
Total		Count	32	1	33
		% of Total	97.0%	3.0%	100.0%

Percentage of Enterprises Using Demand-driven business development service (Appendix #0Table #3)

Statistics		Response	Percent
Valid	33	Non applicable	15.2%
Missing	0	Any information	48.5%
Total	33	Yes	33.3%
		No information	3.0
			100.0

Number of new products developed by SMEs (Appendix #0Table #4)

Enterprise using New Products developed					
	Statistics	Frequency		Percent	
		T	NT	T	NT
Observations	Non applicable	20	12	36.36 %	41.44%
	Restaurant	1	0	3.0	0%

Enterprise using New Products developed					
	Statistics	**Frequency**		**Percent**	
		T	**NT**	**T**	**NT**
Observations	**Non applicable**	20	12	36.36 %	41.44%
	Restaurant	1	0	3.0	0%

	Statistics	Quantity of night	Quantity of ticket sold	Quantity of tours organized	Number of visitors	Amount in Gourds
Observations	Valid	221	221	221	221	221
	Missing	0	0	0	0	0
Mean		109.68	17.77	-6.90	18.82	220503.67
Median		2.00	-8.00	-8.00	-8.00	39000.00
Mode		-8	-8	-8	-8	-9
Std. Deviation		259.681	102.347	4.125	123.490	318778.756
Minimum		-9	-18	-9	-9	-9
Maximum		1468	700	12	840	1500640

Enterprises_needs

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Gestion/management	2	6.1	6.1	6.1
	Développement et maintenance de web site	5	15.2	15.2	21.2
	Gestion/management & Opérations comptables	1	3.0	3.0	24.2
	Développement et maintenance de web site & Gestion/management	1	3.0	3.0	27.3
	Développement et maintenance de web site & Opérations comptables	1	3.0	3.0	30.3
	Développement et maintenance de web site et autres	1	3.0	3.0	33.3
	Gestion/management	1	3.0	3.0	36.4
	Opérations comptables	3	9.1	9.1	45.5
	Opérations comptables & Développement et maintenance de web site	1	3.0	3.0	48.5
	Agrandissement de l'espace	1	3.0	3.0	51.5
	Amenagement de local rue 16	1	3.0	3.0	54.5
	Assistance Technique	1	3.0	3.0	57.6
	Besoin d'Agrandissemet	1	3.0	3.0	60.6
	Developpement	1	3.0	3.0	63.6
	Equipement et amenagement	1	3.0	3.0	66.7
	Espace d'amenagement	1	3.0	3.0	69.7
	Financement	3	9.1	9.1	78.8
	Infrastructure d'accueil	1	3.0	3.0	81.8
	Matériel de transport	1	3.0	3.0	84.8
	Pas d'informations	1	3.0	3.0	87.9
	Reamenagement des chambres	1	3.0	3.0	90.9
	réhabilitation et développement	1	3.0	3.0	93.9
	Ressources Humaines	1	3.0	3.0	97.0
	un rentable marché d'artisanat	1	3.0	3.0	100.0
	Total	33	100.0	100.0	

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Sells amount estimated	25	0	24000000	2732671.01	5342876.332
Hotel_rooms_currently_available	16	2	53	21.00	14.760
Rooms_added_last_12_months	16	0	18	1.13	4.500
Occupancy_rate_of_rooms_in_the_last_12_months	16	0	722	56.02	178.845
Number_of_night_sold_in_the_last_12_month	11	14	11057	2057.00	3669.370
Number_of_tours_organized_in_the_last_12_months	2	2	95	48.50	65.761
Number_of_place_available_in_the_last_12_months	16	9	325000	27955.25	79470.757
Numbers_Tourists_visitors_served	2	79	6000	3039.50	4186.779
Number_of_travel_tickets_sold_in_the_last_12_months	3	22	5000	1853.00	2737.519
Number_of_new_relationship_estblished_between_Tour_operators	2	9	20	14.50	7.778
Valid N (listwise)	0				

Benefiting technical assistance

		Observations	Percent	Valid Percent	Cumulative Percent
Valid	Non applicable	2	6.1	6.1	6.1
	No	18	54.5	54.5	60.6
	Yes	13	39.4	39.4	100.0
	Total	33	100.0	100.0	

Comparison of sells with 12 last month * Benefiting technical assistance * Technical assistances providers

Technical assistances providers				Benefiting technical assistance: Non applicable	Benefiting technical assistance: No	Benefiting technical assistance: Yes	Total
Non applicable	Comparison of sells with 12 last month	Upward Trend	Count	0	7		7
			% of Total	.0%	35.0%		35.0%
		Downward trend	Count	0	6		6
			% of Total	.0%	30.0%		30.0%
		No Change	Count	0	2		2
			% of Total	.0%	10.0%		10.0%
		Non applicable	Count	2	2		4
			% of Total	10.0%	10.0%		20.0%
		4	Count	0	1		1
			% of Total	.0%	5.0%		5.0%
	Total		Count	2	18		20
			% of Total	10.0%	90.0%		100.0%
Association touristique locale	Comparison of sells with 12 last month	Downward trend	Count			2	2
			% of Total			100.0%	100.0%
	Total		Count			2	2
			% of Total			100.0%	100.0%
Du projet MarChE	Comparison of sells with 12 last month	Downward trend	Count			4	4
			% of Total			50.0%	50.0%
		Upward Trend	Count			3	3
			% of Total			37.5%	37.5%
		No Change	Count			1	1
			% of Total			12.5%	12.5%

	Total		Count			8	8
			% of Total			100.0%	100.0%
USAID	Comparison of sells with 12 last month	Downward trend	Count			1	1
			% of Total			33.3%	33.3%
		Upward Trend	Count			2	2
			% of Total			66.7%	66.7%
	Total		Count			3	3
			% of Total			100.0%	100.0%

Supply Markets

		Observations	Percent	Valid Percent
Valid	International Market	13	9.0	9.0
	Only Local Market	66	45.8	45.8
	Do not Know	4	2.8	2.8
	Non applicable	61	42.4	42.4
	Total	144	100.0	100.0

Commodities

		Observations	Percent	Valid Percent
Valid	Plantain Banana	35	24.3	24.3
	Coffee	35	24.3	24.3
	Rice	35	24.3	24.3
	Vegetables	39	27.1	27.1
	Total	144	100.0	100.0

Linkage with Producers in the area

		Observations	Percent	Valid Percent
Valid	Do not Know	6	4.2	4.2
	Any	39	27.1	27.1
	Non applicable	66	45.8	45.8
	Good	33	22.9	22.9
	Total	144	100.0	100.0

Origin of commodities supplying

		Observations	Percent	Valid Percent
Valid	International	24	16.7	16.7
	Local	50	34.7	34.7
	Local &International	4	2.8	2.8
	Do not Know	5	3.5	3.5
	Non applicable	61	42.4	42.4
	Total	144	100.0	100.0

Descriptive Statistics

	Observations	Minimum	Maximum	Mean	Std. Deviation
Number of employees per of SMES	33	5	100	12.61	17.972
Valid N (listwise)	33				

Appendix #1

Market Chain Enhancement/MarChE

Fiche d'informations sur les entreprises collaborant avec le projet MarChE de l'USAID

SECTEUR TOURISTIQUE - REGION NORD ET SUD-EST

Le projet MarChE de l'USAID est un projet qui entend soutenir et promouvoir les entreprises des secteurs agricole, touristique et artisanal. Cette fiche est administrée afin de connaitre la situation des entreprises avec lesquelles le projet MarChE compte travailler. En répondant aux questions suivantes, ceci permettra à MarChE de mieux cadrer son assistance et de voir éventuellement l'effet de ses interventions. Prière de bien vouloir compléter cette fiche d'informations, ce qui ne durerait que l'espace de quelques minutes. Si vous avez des remarques et commentaires, écrivez-nous à l'adresse suivante : info@cnfahaiti.org, ou appelez-nous aux 2517-9880-9881/256-5595-5596.

Code (réservé):………….

B. Caractéristiques de l'entreprise. ***(Veuillez encercler le chiffre correspondant à la bonne réponse)***

A1.Nom de l'entreprise	A2.Tel. de l'entreprise	A3. E-mail de l'entreprise *(facultatif)*	A4. Adresse de l'Entreprise (Rue, Commune, Département)

B.1. Nombre d'employés actuel de l'entreprise :	
B.2. Type d'entreprises dans le secteur touristique ?	1) Hotel & autres types d'institution d'hébergement 2) Bar ou restaurant 3) Agence de voyage 4) Tour Operateur 5) Autres
B.3. Quel est le nombre d'années d'existence de l'entreprise suivant l'avis de l'entrepreneur? (peut être un chiffre décimal)	
B.4. De quel système de gestion dispose l'entreprise ?	1) Aucun document comptable 2) Système de comptabilité de base (entrée-sortie) 3) Système de comptabilité, payroll, fichier des employés 4) Système de comptabilité, rapport financier, plan et rapport de gestion.
B.5. Quel est le plus grand besoin de l'entreprise ?	1) Développement et maintenance de web site 2) Gestion/management 3) Opérations comptables 4) Autres (précisez)……………………………………………………………………………………
B.6. Quel est le niveau de formalisation de l'entreprise	1) Reconnaissance légale (patente) 2) Aucune reconnaissance légale
B.7. Sur quel marché l'entreprise vend-elle ses produits ou services?	1) Marché local 2) Marché local avec extension 3) Marché local et national 4) Marché local, national et international
B.8. Quel est le statut de l'entreprise ?	1) Propriété individuelle ou familiale 2) Propriété collective (société anonyme, société en non collectif, société en commandite)
B.9. A combien de Gourds, estimez vous le montant des ventes totales pour les 12 derniers mois ?	Gourdes
B.10. Comment comparez vous ces ventes par rapport à celles des 12 mois précédents ?	1) Tendance a la hausse 2) Tendance a la baisse 3) Aucun changement 4) Ne sait pas/aucune réponse.
B.11. L'entreprise a-t-elle bénéficié d'une assistance quelconque pendant les 12 derniers mois ?	1) Oui 2) Non(pourquoi ?)………………………………………………………………………………
B.12. Si oui, quel type d'assistance ?	1) Technique (Formation, outils, équipements,…) 2) Financière (crédit)

	3) Subvention 4) Technologie améliorée 5) Autre (Précisez)..
B.13. D'où provient cette assistance ?	1) Du Projet MarChE 2) Autre.(precisez) _______________
B.14. Si vous ou vos employés avez suivi une formation pendant les 12 derniers mois, de quelle thématique s'était-elle rapprochée ?	1) Opérations comptables 2) Marketing/commercialisation 3) Gestion des ressources humaines 4) Gestion/Management 5) Maintenance et développement de site web 6) Finance
B.15. Quel est le nombre de personnes de l'entreprise qui ont participé aux sessions de formation ?	☐
B.16. En quoi cette formation a-t-elle été profitable pour l'entreprise ?	1) Améliorer la qualité des produits 2) Augmenter le niveau de production 3) Augmenter le niveau des ventes 4) Améliorer la qualité des services 5) Améliorer la productivité 6) Gérer mieux la clientèle 7) Augmenter la clientèle 8) Faciliter l'accès au crédit 9) Utiliser de nouvelles technologies 10) Avoir de meilleures techniques de marketing 11) Permettre la diversification des produits et services 12) Autre (Précisez)...
B.17. Au cours de ces 12 derniers mois, avez-vous acheté des services d'encadrement technique pour le développement de votre entreprise ? (ind.2.6)	1- Oui 2- Non
B.18. Grâce à l'assistance dont vous avez bénéficiée, l'entreprise a-t-elle pu développer de nouveaux produits ou de nouveaux services pendant les 12 derniers mois ?	1) Oui 2) Non (pourquoi ?)..
B.19. Si oui, précisez le nombre de nouveaux produits ou services développés par l'entreprise.	1) Nombre de nouveaux produits ☐ - Citez-les ? ____________________ 2) Nombres de nouveaux services ☐ - Citez-les ____________________
B.20. Grâce à l'assistance du projet MarChE, votre entreprise a-t-elle pu avoir, au cours des 12 derniers mois, des contacts ou relations d'affaires avec des acteurs travaillant dans le secteur touristique ou sur des filières agricoles ?	1) Oui (précisez le nombre).. 2) Non ....

C- QUESTIONS SPECIFIQUES AUX HOTELS, GUEST HOUSE

C.1 Nombre de chambres d'hôtels qui sont disponibles actuellement ?	
C.2 Nombre de chambres ajoutées au cours de ces 12 derniers mois	
C.3 Taux d'occupation des chambres sur les 12 derniers mois(TOC) ? C.3.1 Nombre de nuitées vendus sur les 12 derniers mois. C.3.2 Nombre de places disponibles sur les 12 derniers mois TOC = Nombre de nuitées vendues pendant les 12 derniers mois *100 / Nombre de places disponibles sur les 12 derniers mois) Nombre de places disponibles = Nombre de chambres disponibles * 365[6]	☐ ☐ ☐

[6] Au cas où une nouvelle chambre a été ajoutée au cours de l'année, le nombre de places pour cette chambre est égal au nombre de jours de disponibilité de cette chambre pour l'année.

- **MARCHE D'APPROVISIONNEMENT DES PRODUITS**

Les produits	Marché d'approvisionnement ? 1- Local uniquement (à préciser où) 2- International uniquement (à préciser où) 3- Local et international (à préciser dans chaque cas)	Origine des produits achetés sur le marché 1- Local 2- International 3- Local et international	Montant total en Gourds approvisionné sur le marché local pour les 12 derniers mois	Montant équivalent en Gourds approvisionné sur le marché international (Dominicanie, et autre)
Légume (carotte, tomate, laitue….)				
Les fruits comme la mangue francisque				
Les vivres comme le riz				
Café				

D- QUESTIONS POUR LES TOURS OPERATEURS

D1- Nombre de tours organisés pendant ces 12 derniers mois ?---

D2- Nombre de visiteurs desservis à travers ces tours, pendant les 12 derniers mois ?----------------------------------

E- QUESTIONS POUR LES AGENCES DE VOYAGE

E1- Nombre de billets de voyage vendus sur les 12 derniers mois ?___________

E2 – Nombre de nouvelles relations établies avec des tours operateurs durant les 12 derniers mois ? ____________

Tableau de calcul pour les Hôtels

Mois	Quantité de nuits	Montant (en Gourds)
Décembre 08		
janvier 09		
Février 09		
Mars 09		
Avril 09		
Mai 09		
juin 09		
juillet 09		
Aout 09		
septembre 09		
Octobre 09		
Novembre 09		

Mois	Quantité de tickets	Montant (en Gourds)
Décembre 08		
janvier 09		
Février 09		
Mars 09		
Avril 09		
Mai 09		
juin 09		
juillet 09		
Aout 09		
septembre 09		
Octobre 09		
Novembre 09		

Tableau de calcul pour les agences de voyages

Tableau de calcul pour les tours operateurs.

Mois	Quantité de tours	Nombre de visiteurs	Montant (en Gourds)
Décembre 08			
janvier 09			
Février 09			
Mars 09			
Avril 09			
Mai 09			
juin 09			
juillet 09			
Aout 09			

septembre 09			
Octobre 09			
Novembre 09			

Nom et Prénom du répondant :…………………………………………………………………………………

Fonction/ ou relation avec l'entreprise :…………………………………………………………

Tel. :……………………………………E-mail ……………………………………………

Date de remplissage de la fiche :…………………………………………………………….

Indicators List

ID indicator	Outcome Impact or Program Area Impact (OI) & Output Indicators (O)	Type of indicators	Frequency	Unit of Measure	Disaggregated by:	Data Source & implemented Partners -
1.3	(OI) % increased sales and exports for new non traditional commodities/products in non agricultural sector	Outcome	Semi-annual	%	Products (will be defined in art, music, craft & tourism)	Survey conducted by MarChE
1.4	(OI) % increased sale and exports for traditional commodities/products in non agricultural sector	Outcome	Semi-annual	%	Products (will be defined in art, music, craft & tourism)	Survey conducted by MarChE
1.9	(OI) % of increase in sales of supported market chains to the tourism sector ??	Outcome	Semi-annual	%	none	Survey conducted by MarChE
2.1	(OI) % of SME targeted reporting increase in productivity, reducing of cost or increased profit as a result of technical assistance	Outcome	Semi-annual	%	none	Survey conducted by MarChE
2.3	(OI) # of new products/services developed by SMEs.	Outcome	Semi-annual	#	none	CNFA Management system Information
2.6	(OI) % increase of SME s using demand-driven business development services	Outcome	Semi-annual	%	none	Survey conducted by MarChE

APPENDIX II - Characteristics of Micro Small and Medium Enterprises (MSME) in 3rd World Countries

	Micro enterprise	Small	Small-Medium	Medium
Number of Employees:	1-4	5-9	10-29	30-49
Place of Business:	In home	Shop next to home or nearby	Separate from home	Separate location; more sophisticated building
Production Process:	Simple	Simple, but slightly more advanced, more steps	More sophisticated, several different steps with specialization of labor	Complex production process; may be more capital intensive
Financial System:	Cash flow accounting, no formal documentation	Basic accounting system	Accounting system and records in place and payroll or personnel system	Accounting systems and financial records maintained, planning and management reports also in evidence
Credit Sources:	Informal sources at higher interest rates. No access to formal credit due to lack of business records and collateral	Informal sources; need for working capital for supplies and equipment financing	Informal sources; formal credit could be accessible but remains difficult to obtain	Some access to formal credit, but these sources operate slowly and are inflexible in meeting pressing needs
Markets:	Local market	Local market with some expansion	Local and national market, competition apparent, larger quantities of raw materials and supplies needed. Forward and backward linkages to national and community economy	Regional or national markets. Export is possible.
Legality:	Unregistered. Operate in informal economy	Unregistered.	Registered.	Registered; abides by government policy and regulation (i.e. tax and labor regulations, import/export licensing)-

Adapted from Cotter, James;
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