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Why business associations matter:

Assessing the role of APICCAPS in the footwear sector in Portugal

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Abstract

Business associations are little explored entities, which have an important function on businesses growth. Their internationalisation function has previously been highlighted as crucial for enterprises competitiveness.

The footwear sector plays an important role in the Portuguese industrial structure. Particularly, internationalisation has proven to be crucial for the footwear enterprises' growth.

APICCAPS is a major business association in the Portuguese footwear sector, which focus on improving its associates' competitiveness and promote the industry's growth, mainly through the promotion of internationalisation.

This preliminary investigation aims to assess what are APICCAPS roles, beyond the internationalisation process. It intends to explore how associates perceive its roles, if there is a homogenous view between them, and if there is a fit between associates' current and future needs and APICCAPS' current and future roles. To do so, this investigation resorts to a questionnaire made to enterprises, and interviews conducted with managers of APICCAPS and a few associates.

Based on the data gathered, the results of this preliminary study are not conclusive. However, it seems that internationalisation is the most valued role, for enterprises, and the primary role of APICCAPS. As the business association adapts its intervention areas' focus, according to its associates' needs, enterprises showed that they recognize the importance of the remaining roles for the industry's growth. Moreover, the data suggests that APICCAPS can anticipate its associates' future needs.

Keywords: Business associations, footwear industry, APICCAPS.

Resumo

As associações setoriais são entidades pouco exploradas, importantes para o crescimento económico. A sua função de internacionalização foi anteriormente apontada como crucial para a competitividade das empresas.

O setor do calçado tem um papel importante na estrutura industrial portuguesa. Particularmente, a internacionalização já provou ser crucial para o crescimento das empresas portuguesas de calçado.

A APICCAPS é a principal associação setorial no setor português do calçado, focando-se na melhoria da competitividade das empresas e na promoção do crescimento da indústria, principalmente através da promoção da internacionalização.

Esta investigação preliminar pretende compreender quais são os papéis da APICCAPS, para além do processo de internacionalização. Pretende-se explorar como as empresas associadas percecionam tais papéis, se existe uma visão homogénea entre ambos, e se as necessidades atuais e futuras dos associados coincide com os papéis atuais e futuros da APICCAPS. Para tal, esta investigação recorre a um questionário administrado às empresas, tal como a entrevistas com os gerentes da APICCAPS e algumas empresas associadas.

Baseados na informação recolhida, os resultados deste estudo preliminar não são conclusivos. Contudo, a internacionalização parece ser o papel mais valorizado, pelas empresas, e a principal função da APICCAPS. Enquanto a associação setorial adapta as suas áreas de intervenção, de acordo com as necessidades dos associados, estes relevaram reconhecer a importância das restantes funções desempenhadas para o crescimento da indústria. Para além disso, os dados sugerem que a APICCAPS é capaz de prever as necessidades futuras dos seus associados.

Palavras-chave: Associações setoriais, indústria do calçado, APICCAPS.

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Acronyms

AICEP- Agência para o Investimento e Comércio Externo de Portugal

APICCAPS- Associação Portuguesa dos Industriais de Calçado, Componentes, Artigos de Pele e seus Sucedâneos

CTCP- Centro Tecnológico do Calçado de Portugal

SMEs- Small and Medium Enterprises

Introduction

Business associations are economic and political institutions that represent collective interests and offer individual support services and lobbying. They are an important pillar for the enterprises' internationalisation. Trade missions and reverse trade missions sustained by business associations, in particular, allow for new contacts and scale economies, increasing sales and market diversification. However, these entities have other important functions besides assisting companies in their internationalization. They serve as intermediaries between industries and government, representing their members' interests and providing lower administrative costs. Business associations improve linkages among firms and offer advice and selective benefits to their associates by supporting investments, solving current problems and anticipating future needs.

Footwear plays an important role in the Portuguese industry, since the 1970's- when it started expanding. The sector is essentially located in the north region of the country, and it comprises the production of footwear and components such as soles and insoles. The industry is mainly composed of micro and small enterprises, whose exports have been increasing along the years. SMEs have been pointed out as key to employment and the growth of the sector, that counts on internationalisation for its expansion.

APICCAPS, Associação Portuguesa dos Industriais de Calçado, Componentes, Artigos de Pele e seus Sucedâneos (henceforth APICCAPS), is the business association representing the Portuguese footwear industry. Created in 1975, APICCAPS uses its knowledge and experience to invest in the international recognition of its associates, through promotive campaigns, flow of information and technology. Additionally, CTCP, Centro Tecnológico do Calçado de Portugal (henceforth CTCP), supports the footwear cluster, providing access to training, qualification and innovation. Both entities gather enterprises and universities, aiming to improve the efficiency and competitiveness of the sector.

This study aims to explore the role of business associations in developing and sustaining markets, through an exploratory case study of the footwear sector in Portugal. The study is guided by the following questions: What are the roles performed by business associations? How have they evolved? Specifically, regarding the footwear sector in

Portugal, what are the roles performed by APICCAPS? How do its associates perceive these roles? Is there a homogeneous view between them, or not? Is there a fit between current and future roles of APICCAPS and current and future needs of its associates?

This study starts with a brief contextualization of the Portuguese footwear sector and the relevance of internationalisation for its growth. Then it addresses the concept of business association, making sense of the purposes and functions of this type of organisation. Afterwards it describes the research strategy used, which is the explorative case study, detailing the techniques used for data gathering and analysis. It then presents and discusses the evidence at the light of the questions raised. Finally, it concludes by summarising the main findings, acknowledging the limitations found and suggesting further avenues for study.

Chapter 1
Contextualization of the Portuguese footwear industry

The Portuguese footwear industry started expanding after the 1970's, whilst the integration of Portugal in the European Economic Area. In 1975, when the national business association, APICCAPS, was founded, the business employed 15 000 people, produced 15 million pairs of shoes annually and exported 3,1 million euros (APICCAPS, 2021a). The footwear sector produces leather, textile, safety and waterproof footwear. In 1990, the industry exported 851 million euros, and in 2021, 1 676 million euros (APICCAPS, 2022d).

The sector is composed of 1 907 footwear enterprises, of which about 95% are in the north, located in São João da Madeira, Oliveira de Azeméis, Santa Maria da Feira, Felgueiras and Guimarães (Figure1) (APICCAPS, 2017). Only 3,7% are in the centre of the country. Gabor Portugal, Carité Calçados, Jefar, Ecco'Let (Portugal) and Ara Shoes Portuguesa stand out as the five major footwear companies, located in the north of the country, being the latter, two subsidiaries of international companies (Informa, 2022).

The footwear sector is an industry composed, in 2021, by micro (56,44%), small (31,87%), large (0,48%) and medium (11,21%) enterprises, being the latter the ones that held the highest turnover and employment level. Although the oldest companies (with twenty or more active years) constitute only 22,85% of the total enterprises, they retain 64,58% of the total turnover, employing about 53% of the total workers (Banco de Portugal, 2021).

Figure 1 Distribution of the footwear enterprises, NUTS II
Source: Banco de Portugal, 2021

As for the national suppliers of the footwear industry, they constitute 342 enterprises specialised in soles, insoles, foothills, toecaps, zip fasteners and applications (Informa, 2022). These firms are mainly located in Aveiro, Porto and Braga (Figure 2), near their local clients, and the five major enterprises are Aloft, Soprefa, Lusocal, Real Step and Dehora, which are all Portuguese companies. The main international suppliers of the industry are Italy and Spain, providing both components and leather (APPICAPS, as provided in the interview).

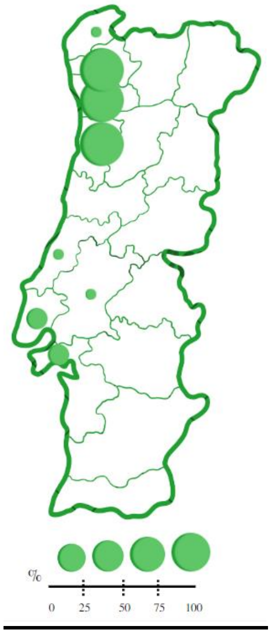

Figure 2 Distribution of the footwear suppliers, NUTS II
Source: Informa D&B

In global terms, although the weight of footwear, in the total Portuguese exports, decreased 0,9%, from 2010 to 2020, total exports grew by 29% (República Portuguesa, 2022). In 2021, the sector exported 69,3 million pairs worth 1 676 million euros (APICCAPS, 2021a), being Germany (23,4%), France (19,9%) and Netherlands (14,3%) the main buyers (Figure 3). Beyond the European Community, the country sold eighty-four million euros to United Kingdom, 6% of footwear exports, and sixty million euros to United States, corresponding to 4,4% (CTCP, 2022). From 2017 to 2021, exports grew, by 4,3% to Germany and 0,3% to Netherlands, and decreased 1,1%, 0,2% and 0,8% to France, United Kingdom and Unites States, respectively (República Portuguesa, 2022).

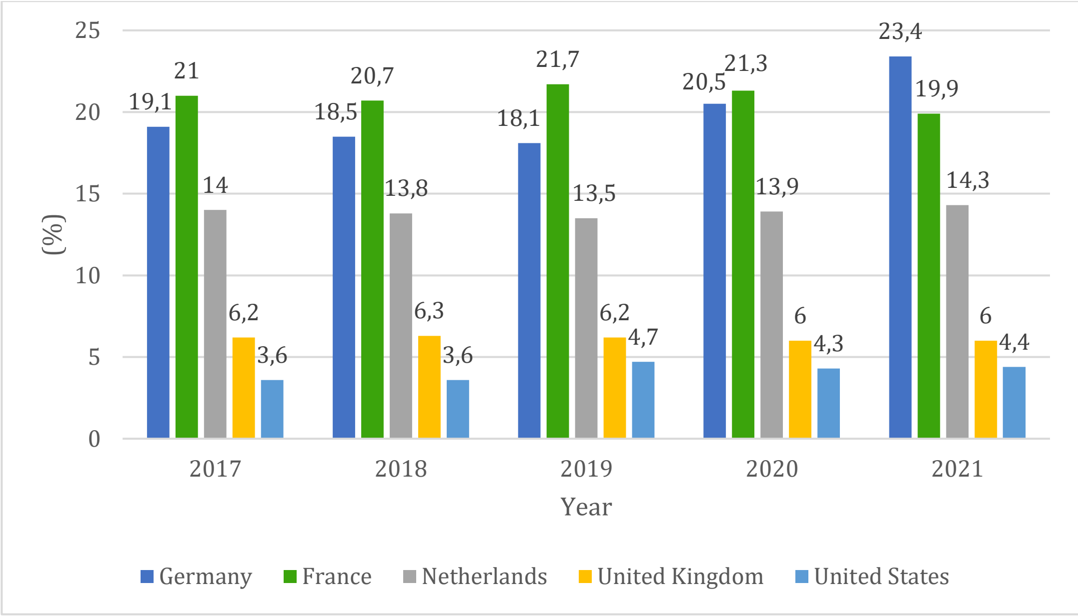

Figure 3 Main footwear exports' destination markets
Source: APICCAPS

The industry is specialized in leather footwear but has been "diversifying its offer" (APICCAPS, 2021a) also to other types of footwear, which use different raw materials and technologies, such as rubber and plastics (APICCAPS, 2021b). In 2021, waterproof and textile footwear registered the highest values in terms of exports: 56 and 75 million euros, respectively. Portugal produced seven million pairs of waterproof shoes, being the fifth major waterproof footwear exporter, owning 3,8% of the market share and the ninth for leather shoes, ensuring 3,1% of the global exports (APICCAPS, 2022c).

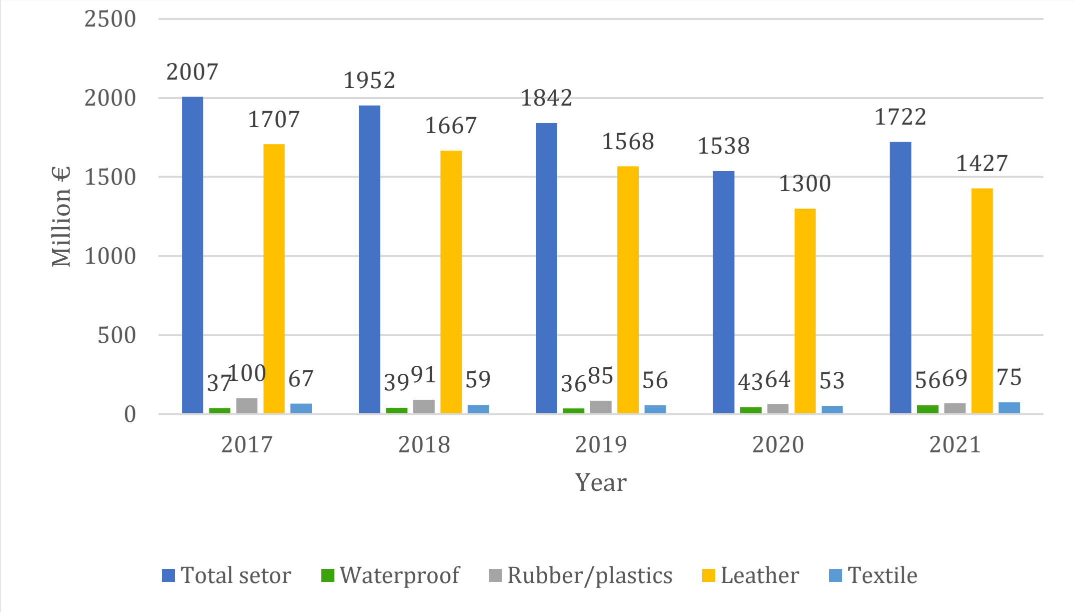

Figure 4 Exports by type of shoes
Source: APICCAPS

The number of Portuguese footwear enterprises (Figure 5) and people working in the sector (Figure 6) had been increasing since 2015, reaching its peak in 2017, when it registered 2 138 companies and 47 599 workers. However, since then, these values started to decrease, totalizing 1 864 and 40 139, respectively, in 2021 (Banco de Portugal, 2021).

The decline of footwear enterprises could be explained by the fact that the footwear industry doesn't enjoy economies of scale- when companies are growing, it needs more employees, more machineries and a larger plant-size. It is usual that enterprises hire or create other companies, mostly in cutting and sewing, and when production decreases, these end up disappearing (previous meeting with Dr. Carlos Silva, APICCAPS' studies department and Dr. Alfredo Jorge Moreira Executive Director of APICCAPS' studies department). Another explanation is the fact that the industry has chosen to focus on production's quality (interview with Dr. Luís Onofre, President of APICCAPS).

In turn, the continuous decline in the number of people working in the footwear sector is recognized as a "serious problem", making it clear that younger generations are not attracted by the industry (interview with Dr. Luís Onofre, President of APICCAPS).

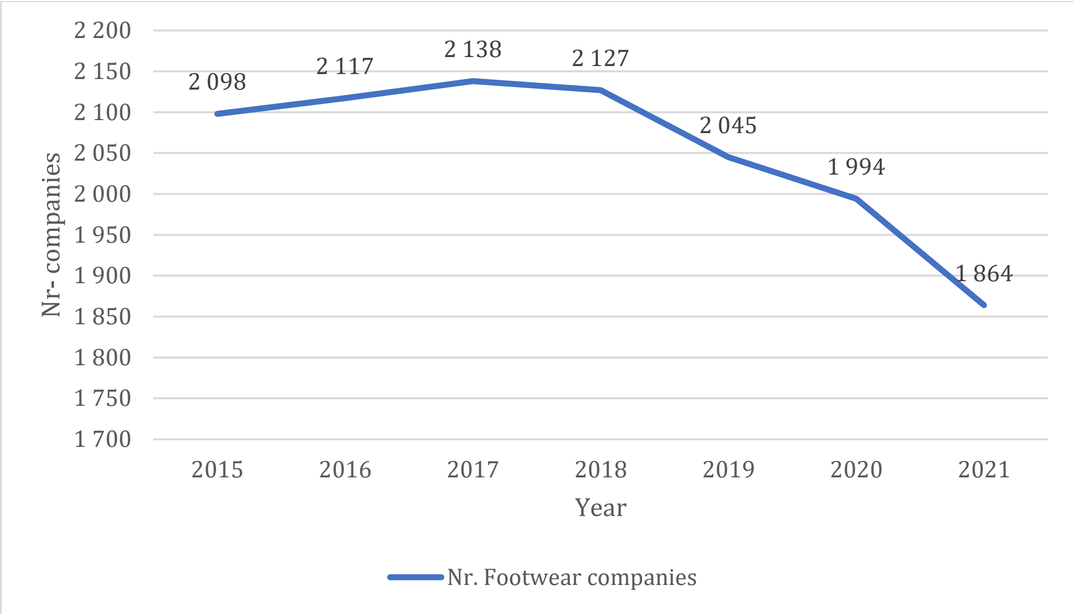

Figure 5 Evolution of the number of Portuguese footwear enterprises
Source: Banco de Portugal, 2021

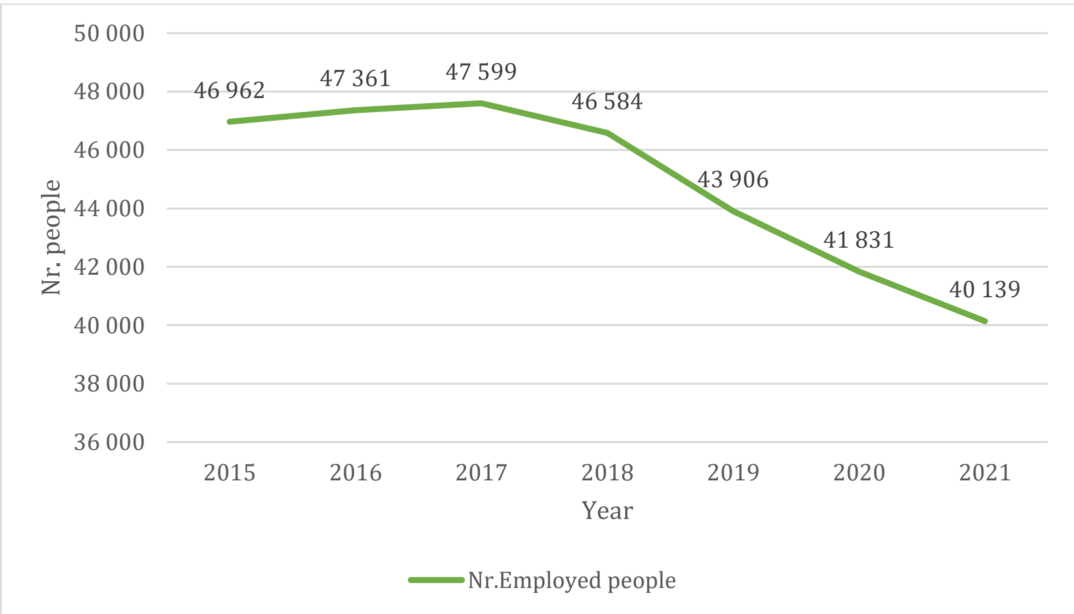

Figure 6 Evolution of the number of people in the sector
Source: Banco de Portugal, 2021

The industry's turnover rate of change followed a similar tendency, increasing until 2016 and decreasing until 2020 (Figure 7). Mainly explained by the small and medium enterprises, the footwear sector's rate of change registered its lowest in 2020[1], what could be due to the covid-19 pandemic, recovering in 2021.

[1] $Turnover\ rate\ of\ change = \frac{Total\ revenues_t - Total\ revenues_{t-1}}{Total\ revenues_{t-1}} \times 100$

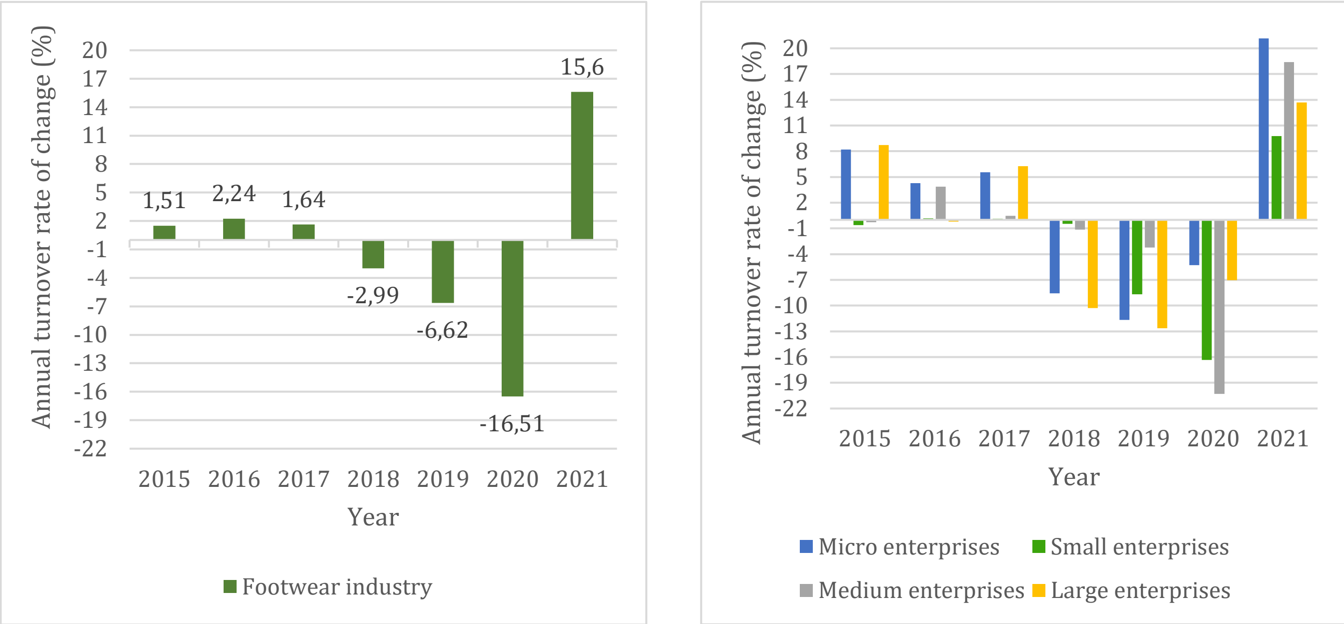

Figure 7 Evolution of the sector's annual turnover rate of change (%)
Source: Banco de Portugal, 2021

From 2015 to 2017, the weight of exports in the industry's total turnover increased 0,76%, followed by a decline of 2,07% in 2018 (Figure 8). The latter was considered an "atypical year" since exports increased in volume but decreased in value (APICCAPS, 2018). From 2018 to 2020, the weight of exports in total turnover increased 4,55%, growing at a lower rate in 2021.

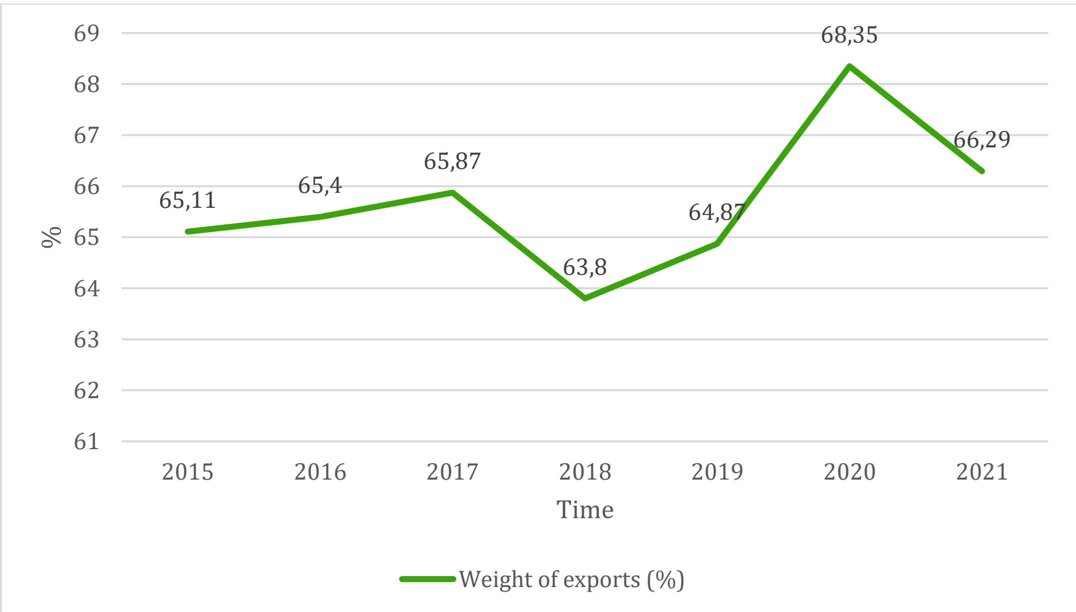

Figure 8 Weight of exports in total turnover
Source: APICCAPS

From 2015 to 2021 the weight of exports, has always accounted for more than 50% of the industry's total turnover. Its increase, between 2018 and 2020, could be explained by the fact that the sector started to focus on more quality, increasing the final products' prices. The sector's turnover rate of change became negative after the atypical year of 2018. Aligned with the fact that the industry doesn't enjoy economies of scale, this phenomenon might explain the above mentioned decline in the number of companies and people operating in the sector. In 2020, the industry's turnover rate of change registered its lowest, due to the pandemics, recovering in 2021.

Portugal was one of Europe's countries whose footwear industry did not weaken considerably over the years and that keeps mobilizing "hundreds of companies and ten thousand of workers" (APICCAPS, 2021a). In the first semester of 2022, Portugal had already exported 40 million pairs of shoes, worth 957 million euros, pointing to a 22% and 27,5% growth in quantity and value, respectively, compared to the previous year. The sector is increasing its presence in the most relevant markets and had already exported more than 95% of the total production, to 170 countries in the five continents, surpassing the numbers of 2019 (APICCAPS, 2022d).

The country is internationally recognised for the quality and design of its footwear, evolving from a traditional industry to a modernized and digitalized one (APICCAPS, 2022d). Footwear plays a significant role in the Portuguese industrial structure, becoming, in 2021, the 13th biggest exporter in the world (APICCAPS, 2022d). Portuguese companies offer several products, from classic to sports shoes, professional and eco-friendly and have been integrating new competencies and techniques, aligned with technology in production and quality control. According to APICCAPS, their adaptability to consumers' needs and the increase in products value added, made it possible to go from private label to an internationally recognized set of Portuguese brands. "Made in Portugal" is increasingly a quality sign (APICCAPS, 2022d).

However, the Portuguese footwear industry has and keeps passing through some crises. In 2019, the Covid-19 pandemic disrupted the Portuguese economic activity and since 2022, the Russian-Ukrainian War increased the costs of production of firms and decreased the purchasing power of individuals. The latter is also challenging economies around the world, including Portugal's resilience. It is causing inflation and debt, rising the interest rates and increasing poverty levels, leading to "a sharp global slowdown"

(The World Bank, 2022a). The food and energy prices are the most affected, followed by the crude oil and natural gas (The World Bank, 2022b). The increase in prices and transportation costs, but also the quality and quickness required from the Portuguese production, increases the country's demand for a more qualified workforce.

Besides, there's an evident change of tendencies for the footwear market. Z Generation looks for brands like Nike, Adidas, Puma, Anta and Under Armour, to purchase sports shoes. "Sneakers have an assured market" in these modern times, potentiated by marketing in the football business (APICCAPS, 2022d). In 2021, Nike's turnover represented 66,3%, of the total footwear turnover, and it is expected that sales will continue to grow globally, reaching 165 000 million dollars in 2030. Other than the rivalry of these major brands, Portugal faces the leading position of China that holds 54,1% of the market share, being Netherlands, Germany and France its main European costumers (República Portuguesa, 2022).

However, China has been losing its market share, for more than a decade, to other Asian countries whose footwear industry has been a success for the past ten years (APICCAPS, 2022d). Vietnam assured more than ¼ of the global footwear exports and, in 2021, owned 26,3% of the total textile footwear exports (APICCAPS, 2021b). On the other hand, the pandemic led major sports brands to change from outsourcing to nearshoring, moving their supply from Asia to Portugal (Larguesa, 2022). Nonetheless, according to the World Footwear Yearbook, the country had already produced 11 118 million of pairs of shoes, in 2022, corresponding to 54,3% of the world's production. China is exporting mostly to USA (1 100 million pairs), Japan (396 million) and Philippines (448 million) (APICCAPS, 2022c), leading leather, rubber and plastics, and waterproof exports, globally (APICCAPS, 2021b).

Chapter 2
The role of business associations

2.1 Nature and focus of business associations

Business associations are institutional actors that represent the interests of companies and organizations. Their focus is to strengthen collaboration among their members, improving the development of individual businesses (Bennett, 1998), mainly, for Small and Medium Enterprises (SMEs). Within this focus, (E. Costa et al., 2017) highlighted internationalisation: these authors identify business associations as “export promotion organizations” that are characterized by collective bodies whose membership is voluntary and motivated by common interests (Costa et al., 2017, p.1186). Their role is to promote businesses internationalisation, “fostering more collaborations between members” (Costa et al., 2018).

Trade associations can be distinguished by their type of member organization-association of companies, owner-manager, self-employed professionals, etc-, type of services and type of association (Bennett, 1998). Within the latter, each association can have different membership density- quantity of members-, services and staff size. According to(J. Bennett, 1998), the focus of most associations is on “information, advice, benchmarking, influencing governments, conferences, social events and newsletters”. Besides, different enterprises have different needs, so, when it comes to services provision, business associations appear to prefer diversification rather than intensification.

They serve as intermediaries between industries and the government, providing services for their members trough lobbying, technical support, information, advice, conferences and training. They represent, make rules and inform their members (Doner & Schneider, 2000), contrasting to other forms of collaboration, such as alliances. These associations are economic and political institutions, capable of shaping incentives, payoffs and strategies, “composed of companies and enforcement mechanisms to ensure that members abide by the collective agreed-upon norms and rules.” (Marques, 2017, p.734).

Trade associations have the capacity to influence the market development through influencing the competitiveness of their associates (Bennett, 1998). With their capability of trading tacit knowledge with other markets and within companies, they offer a higher compliance with legislation, lower administrative costs and better designed regulations, being beneficial also for governments (Costa et al., 2017). These are believed to strongly influence the effectiveness of trade associations (Bennett, 1999a).

Governments can not only give status to business associations and help them develop their resources, but also create a partnership with them for the purpose of policy making. They grant associations benefits, like lobbying, in return for economic development (Doner & Schneider, 2000). As Bennett analyses, business associations "are subject to a process of endemic fragmentation and disparity of quality and diversity unless government takes a strong role (…)" (Bennett, 1999a, p.596). Government policy does not improve businesses competitiveness directly. Instead, it seems to be more efficient in improving the collective industry standards, contributing then to each business expansion.

As studied by (Doner & Schneider, 2000), business associations focus on controlling markets that are crucial for their members' success. However, this horizontal coordination, will only prove helpful if companies are pressured to make an efficient use of the profits obtained. Trade associations also facilitate supply, prices and quality coordination between upstream and downstream activities. By encouraging investment in new technologies and capacities, they can improve linkages among firms, reducing investment risks. Membership density, extensive selective benefits and effective internal interests' mediation are believed to be the main reasons for some business associations to be stronger than those which don't have, at least, one of these attributes.

The logic of services and the logic of influence, pointed out by Streeck and Schmitter, affect the demand for associations (Streeck & Schmitter, 1985). The former, drives the association to provide individual services, responding to individual needs, and is driven by the need to maintain or increase volumes or turnover (Bennett & Ramsden, 2007). Such associations will require a high level of executive authority. On the other hand, the logic of influence focuses on the role of the association on acting collectively on behalf of all or most of its members' interests.

Bennett classifies the different types of approaches of business associations services provision. Individual support services are characterized as exclusive to members, such as information, advice and consultancy (Bennett, 1999a). On the contrary, lobbying and representation belong to the group of support services that are nonexcludable. Finally, self-regulation exists when an association has sufficient power to exert scrutiny, monitoring and enforcement over its members.

Through the logic of influence, even companies that don’t contribute to the trade association will benefit, engaging on free riding and creating low incentives to develop/maintain the enrolment (Bennett & Ramsden, 2007). Low membership, instability over time and opting out are some of business association’s disadvantages. Different type of members have different needs, thus different demands (Costa et al., 2018). Due to the free riding problem and inequalities of representation, the limitations that governments can create and the competitive environment among enterprises, there are some problems with achieving and maintaining compliance. As so, membership becomes more valuable, and exit becomes more costly when business associations have essential privileges to offer (Doner & Schneider, 2000).

Based on previous literature, the main reasons for firms to join a business association are the search for solutions to problems, the ambition/necessity to expand and find new partners and the anticipation of future individual needs (Costa et al., 2017). (Bennett, 1998) found that the characteristics of the sector in which each company is operating, aligned with the market’s conditions, is what influences the most, the reasons for membership- the level of the sector’s competition, the company size variation and the level of government intervention, are some of them. More competition could mean low profit margins; if different companies had similar sizes, it would be easier to align their interests; and more government intervention calls for a greater level of sector organisation (Bennett, 1999b). Moreover, diversification of services is more likely to promote or maintain membership rather than an intense focus on only a few services.

Nonetheless, literature suggests a difference between SMEs and large firms’ motives to be part of a trade association. Besides advice and representation of their interests, SMEs benefit from social opportunities, self-regulation and lobbying (Bennett & Ramsden, 2007). These types of companies are more dependent on services, information and contacts when compared to large enterprises that can self-supply (Costa et al., 2017). On one hand, information provision, advice, internationalisation of representation and networking were concluded to be the main reasons for SMEs to develop and/or maintain their membership. On the other hand, large enterprises focus on lobbying and representation, joining business associations, mostly, to gain legitimacy for their businesses (Bennett, 1998).

However, some benefits of joining trade associations, such as improved political and regulatory environment and the representation of their members, are nonexcludable (Barnett, 2013). For example, by reducing taxes and tariffs, all the sector's companies will gain. Reducing information costs is one of the cases where "collective action" is pareto optimal since, frequently, the costs cannot be covered by any one member, but they all benefit from information (Doner & Schneider, 2000). Through the logic of collective action, Olson argues that business associations with fewer members are more likely to engage in collective action because, when compared to trade associations composed of a larger membership, the total benefits are divided among fewer actors (in Marques, 2017).

While assessing what drives business associations' activity, (Barnett, 2013) concluded that firms tend to follow market leaders' actions, being more willing to join a trade association in their presence. They provide dominant firms the means to dominate and shape trade associations' policies, mobilizing their action to solve individual problems. Moreover, business associations were found to be capable of surviving without member dues, since their higher funding comes from activities such as meetings and seminars. Thus, these events could be more focused on attending to the dominant firms' issues rather than focusing on the shared interests of their associates.

Trade associations register high expenditures when their four largest associates have low performance, but the same doesn't happen when evaluating the overall associate's performance. This suggests that business associations may speak for and serve better, the interests of the industry's dominant firms (Barnett, 2013). As such, members of business associations with high membership, can enjoy diversity and increased influence, but might not see their problems solved. Instead, smaller trade associations have less influence but may constitute a greater benefit for its members, when serving their interests.

2.2. Major business organizations in the Portuguese footwear sector: APICCAPS and CTCP

APICCAPS is the business association that represents the Portuguese footwear industry since 1975. Chaired by Luis Onofre, it is headquartered in Porto and represents 350 associates from four sectors: footwear's trade and manufacture, components for footwear, leather goods and equipment's trade and manufacture (APICCAPS, 2022a). Some of the main functions of the association are to promote a collaborative environment between associates, defending their interests and rights; share information encouraging its associates' development; promote technological investigation and the quality of production; and promote a Portuguese footwear industry enhanced image and fashion (Estatutos, 2014). The association promotes constant innovation for the competitiveness of enterprises, providing legal support and information, incentivising investment and employment, safety and hygiene at the workspace and securing the competitiveness of firms.

Its main intervention areas are in internationalisation, investigation and projects, assistance, formation and information, technology, innovation and quality and sustainability. APICCAPS organizes fairs around the globe, aiming to consolidate the Portuguese footwear industry position in the already established countries, reach new export destinations and markets and promote the internationalisation of new companies (APICCAPS, 2022a). Moreover, it invests in communication and the promotion of the industry's image through publicity, communication consultancies, online platforms, catalogues and digital marketing. Finally, its projects focus on providing the necessary orientation to SMEs, regarding knowledge and information, mobilizing them towards innovation and valorisation.

In turn, CTCP is a non-profit organisation created in 1986 by APICCAPS, jointly with two Ministry of the Economy Institutes: Instituto de Apoio às Pequenas e Médias Empresas e à Inovação (IAPMEI) and Instituto Nacional de Engenharia, Tecnologia e Inovação (INETI) (CTCP, 2020). With offices in Felgueiras and São João da Madeira and chaired by Reinaldo Teixeira, CTCP employs 50 people, in which 40 are engineers. The organization supports leather and leather goods industries, "accessories, safety products, rubber and plastics, footwear machinery, sectorial software, polymers" industries (DTIB, 2017). Some of its areas of expertise are training and qualification, quality control, innovation and digital manufacturing (CTCP, 2020). Its main goals are to support the footwear and related industries and enterprises' human resources, technological and technically, promote the quality of products and industrial processes, share information and promote investigation, development and demonstration projects.

APICCAPS develops different projects, involving different stakeholders. For instance, jointly with CTCP, footwear companies, universities, and technology specialized enterprises, the "BioShoes4All" project was created to approach a more sustainable industry. It combines biomaterials, ecological footwear, circular economy and technology and training, to increase the country's market share, guaranteeing "innovation, differentiation, quick and effective response, (…), product quality" (APICCAPS, 2022b). Another example is the FAIST project, that aims to increase "the degree of specialization of the Portuguese footwear industry for new types of products", investing up to sixty million euros, to improve efficiency and gains in competitiveness.

Investing in internationalisation, APICCAPS is responsible for the production and announcement of the sector's information in its journal, on the tv channel "What's up – Olhar a Moda" and on the Portuguese Soul magazine, revealing itself as an important actor for the sector's sustained development. From the beginning of its "Portuguese Shoes" campaign, - "The Sexiest industry in Europe" campaign- created in 2010, until 2016, Portuguese footwear industry's exports increased more than 55% (CIP, 2016). Through the Footwear and Fashion Cluster, the industry will invest 140 million euros between 2023 and 2025, with the help of CTCP, to become "the international reference in the development of sustainable solutions" (APICCAPS, 2021a).

On the other hand, APPICAPS, together with AICEP, Agência para o Investimento e Comércio Externo de Portugal (henceforth AICEP), are the main actors in the successful international expansion of the footwear industry, due to the knowledge and experience in the area (APICCAPS, 2021b). They both organize targets for commercial prosperity and promotive campaigns abroad.

2.2.1. The internationalization process as a focus for APICCAPS

The internationalisation process is one important function of business associations, particularly of APICCAPS. Previous literature has already given some attention to the role of internationalisation process in the growth of enterprises, including the Portuguese footwear industry (Costa et al., 2017).

This process requires a good management of much information, while SMEs are pointed out as an important pillar of growth and employment (Costa et al., 2017). Eric Costa, António Lucas Soares and Jorge Pinho de Sousa interviewed twenty Portuguese business associations aiming to understand the role of platforms in the support of the internationalisation of SMEs, identifying the lack of information and suitable tools for managing information as the main problems. Digital platforms play an important role in "facilitating the communication inside work groups (…), supporting online communities (…), creating knowledge (…), managing knowledge in clusters of firms (…), and establishing collaborations (…)" (Costa et al., 2018, p.72).

For instance, these authors explored how Portuguese business associations use their resources to improve their associate's internationalisation. APICCAPS, in particular, considered contacting journalists and the press to be "interesting ways of communicating their sector". Trade missions- going to foreign markets with its associates- and reverse trade missions- bringing foreign companies to Portugal-, are two pillars of the internationalisation process that allows the business association's members to make new contacts. Moreover, AICEP was the entity considered crucial in the internationalisation process, "The first information source normally on the market is the local office of AICEP" (Costa et al., 2017, p.1191).

The literature reveals that APICCAPS' follow-up process is mainly done through interviews and surveys, accessing the extent to which an initiative was successful or not. The footwear business association understands "the increase or decrease of participations in the next edition" as being a "feedback on whether the fair is progressing well or badly" (Costa et al., 2017, p.1193). Besides, it collects and provides new information or tries to mobilise local agents to help its members solve specific problems.

Within the Portuguese footwear industry, internationalisation seems to be a crucial process for a company's development. According to APICCAPS, footwear plays an important role in the Portuguese industrial structure (Rocha et al., 2020). The general motives for firms to internationalize were found to be the crisis of the sector, the high purchasing power of European countries, such as France, combined with the geographical proximity, and the reduced capacity of the national market. The latter being characterized by few demands, which makes national companies "too dependent".

Digital marketing, product differentiation and visiting potential customers, are some of the main strategies used by enterprises to reach visibility. Their presence in international fairs, promoted by the sector's business association, and collaboration with agents, allows footwear companies to get exposed and take their products abroad. On the other hand, high competition, bureaucracies and customs fees are point as the major barriers (Rocha et al., 2020). The territorial proximity of raw materials and labour, suppliers, training and education also facilitates growth. Thus, the internationalisation process appears to be crucial for footwear companies' development, especially SME, as it increases sales, allows scale economies, job stability and market diversification.

2.3 Synthesis

Business associations have been demonstrated to be important associations for representing their members interests. They are capable of influencing their associates' competitiveness, through guiding their internationalization process and controlling the sectors' crucial markets, contributing also to policy making. Through fairs, publications, campaigns abroad and investment in sustainability and innovation, APICCAPS focus seems to be internationalisation. However, what other roles does it carry out? The research questions that this thesis aims to answer are: What are the roles performed by business associations? How have they evolved? Specifically, regarding the footwear sector in Portugal, what are the roles performed by APICCAPS? How do its associates perceive these roles? Is there a homogeneous view between them, or not? Is there a fit between current and future roles of APICCAPS and current and future needs of its associates? The next chapter presents the method used to address these questions.

Chapter 3
Methodology

3.1 Research Strategy

Previous literature on business associations, reveals differences between these organizations, including on the variety of services that each one can offer. It is also scarce, thus stimulating the interest to study the role performed by business associations and how far is there a fit between what they currently do and plan to do, an what their associates perceive they should be doing, now and in the future. To address these issues, this research resorts to an exploratory case study of APICCAPS, the business association within the Portuguese footwear industry. The case study uses a questionnaire and interviews, as methods for data collection. Besides, descriptive statistic and content analysis are the tools used to analyse the questionnaire and the interviews, respectively.

A case study is an approach focused on "understanding the dynamics present within single settings" (Eisenhardt, 1989). To explore APICCAPS' services, it's important to understand the context of the present phenomenon. An exploratory case study is a "preferred strategy when "how" or "why" questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context" (Yin, 2003). This study resorts both to qualitative and quantitative data collection strategies.

The qualitative methodology involves a "sense making" research that goes beyond predicting and explaining (Bhattacherjee, 2012). It consists of the analysis of information, such as data gathered in surveys, interviews and participant observation, requiring a personal knowledge of the social context (Piekkari & Welch, 2004). More than the observable- what-, it seeks to understand the meanings and beliefs of a subject- how and why. On the other hand, quantitative methodology "can indicate relationships which may not be salient to the researcher" (Eisenhardt, 1989). Using this mixed method approach allows for a broader range of answers, on one hand, and a deeper understanding of the roles performed by APICCAPS and how these are perceived by its associates, on the other.

3.2 Data collection and analysis

The Portuguese footwear business association, APICCAPS, constitutes the object of this study. Given the research questions, it was relevant to collect both its perceptions, as well as those of its associates, who are currently 208 (APICCAPS).

Questionnaires are an information collection instrument that consists of a set of planned questions intended to gather information in a standardized manner (Bhattacherjee, 2012). The one administered to APICCAPS' associates, was composed of closed and opened questions, to obtain an overview of which APICCAPS' services are the most valuable to enterprises. Questionnaires are an inexpensive, easier and faster way to gather more information, from more respondents, as results are instantly recorded in an online database (Bhattacherjee, 2012).

Using Google Forms, the planned questionnaire was sent to all APICCAPS' associates, through the emails provided in the business association's webpage. An e-mail recall was made to the same emails, one month later and, considering the low response rate, it was necessary to get in touch with each one of the 208 enterprises, by phone call. This resulted in reaching a response rate of 14,4%, corresponding to 30 answers. The questionnaire was composed of 18 questions, based on the literature review of business associations' main roles and APICCAPS' website.

In turn, interviews give the interviewer "the opportunity to clarify issues raised by the respondent" or to ask, "follow-up questions" (Bhattacherjee, 2012, p.78). In this investigation, interviews followed the questionnaire, aiming to clarify, in depth, the data gathered. Different interviews were conducted to APICCAPS (on Appendix) and six of its associates (on Appendix), using different interview guides: the former, conducted alongside an interview guide of 15 questions, was aimed at allowing a better understanding of enterprises' needs, from APICCAPS' point of view; the latter, composed of 16 questions, was aimed at complementing the questionnaire with in depth perceptions. For the interviews, 6 enterprises were selected- according to the criterion of dimension, measured by the number of employees. The enterprises were chosen by convenience. Two of them were selected by their presence in the market, taking into consideration the advice of a previous exploratory online meeting with Dr. Carlos Silva, from APICCAPS' studies department, and the Executive Director, Dr. Alfredo Jorge Moreira. The interviews were previously scheduled with each entity. Before starting the interview, interviewees were informed about the purpose of the study and asked whether they allowed recording. All interviewees agreed with it.

Interviewee	Organization	Position in the organization	Inerview's duration
Dr. Luís Onofre	Conceição Rosa Pereira & CA, Lda/APICCAPS	CEO/President	41:51min
Dra. Fátima Henriques	Fernando J. Henriques, Lda	Manager	18:14min
Dra. Graça Neto	Netos Fábrica de Calçado, Lda	Director	10:59min
Dr. Francisco Silva	Jefar, Indústria de Calçado, Lda.	Financial Director	36:32min
Dr. Carlos Silva & Dr. Alfredo Jorge Moreira	APICCAPS	Studies department and the Executive Director of studies department	1:10:13min
Dra. Catarina Vaz	Rodiro Fábrica de Calçado Lda	Human Resources Director	18:44min
Dra. Maria João Almeida	António de Almeida, Lda	Director	12:58min

Table 1 Interviewees
Source: own elaboration

Closed answers were analysed through descriptive statistics, whereas the questionnaire's opened answers and interview's transcriptions were analysed manually, based on patterns' detection.

Besides the questionnaires and interviews, data was also gathered via documentation, namely assessment reports published by APICCAPS and available on its website.

Chapter 4
Results

Due to the limitations of data collection, namely the low response rate to the questionnaires and the scarce number of interviews conducted, it is not possible to draw conclusions for the whole sector. However, it is possible to obtain, from the data analysis, relevant insights that may be further explored.

Internationalisation appears to be the major motive to join (Appendix, Chart 2) and belong (Appendix, Chart 3) to APICCAPS, by establishing connections in foreign markets. Besides SMEs, which constitute the majority of respondents to the questionnaire, the micro and large enterprises also seem to have joined and keep their ties, mainly, for internationalisation purposes (Appendix, Chart 4,5 and Appendix, Chart 6,7, respectively).

However, the data collected from the interviews does not allow for solid conclusions, as the different associates joined APICCAPS for different motivations. For instance, Fernando J. Henriques, Lda, was already exporting its production when it joined the business association, recognizing international disclosure and representation as an advantage of being APICCAPS' associate.

The different enterprises also value the support with labour laws and the specialized information about markets, imports and exports, considering fees as a fair price, for the benefits they can get:

" (...) APICCAPS produces excellent information about markets, exports, imports (...). We usually address its legal department for collective negotiations." (interview with Dr. Francisco Silva, Financial Director of Jefar, Indústria de Calçado, Lda., own translation);

" (...) it's a more than fair price." (interview with Dra. Maria João Almeida, Director of António de Almeida, Lda., own translation).

For APICCAPS, associates' quotas represent only 5% to 10% of its revenues (interviews with Dr. Alfredo Jorge Moreira Executive Director of APICCAPS' studies department).

From micro to large enterprises, the majority (76,6%) access mainly footwear fairs (Appendix, Chart 8), which is considered the most important service for micro and small enterprises (Appendix, Chart 9; Appendix, Chart 10, respectively). In accordance with the questionnaire, the interviews enable to confirm that fairs are considered an important service for most of the enterprises, whereas investment in innovation projects is mostly sought by large enterprises (interview with Dr. Luís Onofre, President of APICCAPS). An example is Jefar, Indústria de Calçado, Lda which, jointly with CTCP and sector related companies, developed a product that would adapt to the diabetic disease*: "We plan to engage in the diabetic's footwear market, soon."* (interview with Dr. Francisco Silva, own translation). However, the small company, Conceição Rosa Pereira & CA, Lda, is also included in an APICCAPS' project that is creating energy sustainable solutions for footwear enterprises.

Associates considered internationalisation programs as the core service provided by APICCAPS (Appendix, Chart 11). When comparing the importance of internationalisation programs, including fairs, with training and other nine services from "Valorização da oferta" (increasing offer value) project, communication advisory and publicity was classified as the most relevant to the companies (Appendix, Chart 12), especially to medium-sized ones (Appendix, Chart 13). APICCAPS understands the preference for these services over internationalisation fairs:

"At the moment, enterprises' productive capacity is completely taken, they can't respond to orders (...) why should they try to meet new clients, whom they won't be able to satisfy? (Dr. Carlos Silva, APICCAPS' studies department, *own translation).*

Thus, enterprises do not seem to be looking for new clients. On the other hand, overall, companies are not able to establish and internationalise their brand, as it costs, permanently, a considerable amount of money to invest in advertising, communication and keep up with present priorities, such as sustainability (interview with Dr. Alfredo Jorge Moreira Executive Director of APICCAPS' studies department). For instance, Jefar, Indústria de Calçado, Lda, a large enterprise, has already tried to establish its own brand, ending up quitting and prioritizing international labels (interview with Dr. Francisco Silva). From the six interviewed enterprises, only Conceição Rosa Pereira & CA, Lda has successfully settled its own brand, Luís Onofre. Besides, the sector is already well known by its production quality: " *(...) we built a "made in Portugal" that is solid* *and strong, so that people or international brands see Portugal (…) (Dr. Luís Onofre, President of APICCAPS, own translation).*

Training is costless and encompasses many subjects (interview with Dr. Luís Onofre, as President of APICCAPS). The service was classified as the third most important one, mostly by small enterprises (Appendix, Chart 14), as "very important", but also as the least important one (Appendix, Chart 11). Almost 40% of the respondents, considered qualified and non-qualified training as a service to be developed by APICCAPS, in the questionnaire's opened question (Appendix, Table 1). Within the interviews, only two enterprises mentioned resorting to training:

"(…) we always learn something with them, and they learn with us, too" (Dra. Fátima Henriques, Fernando J. Henriques, Lda, own translation);

"Rodiro cares about its employees formation. Training is the key secret. (Dra. Catarina Vaz, Human Resources Director, Rodiro Fábrica de Calçado Lda, own translation).

APICCAPS provides, jointly with CTCP, training for several areas such as sustainability, coaching and languages (interview with Dr. Luís Onofre, President of APICCAPS), as the Centro de Formação Profissional da Indústria do Calçado provides non-qualified training. Although enterprises have indirect costs, like giving compensations to employees for extra-hours or allocate a workday to training, the direct costs of accessing this service are "practically zero" (interview with Dr. Alfredo Jorge Moreira Executive Director of APICCAPS' studies department).

The main limitations mentioned by enterprises, are mostly related to current events. For instance, the pandemics interfered with companies' production process, aligned with governments' policies such as the financial help provided during the pandemics, which had to be returned on two years (interview with Dra. Fátima Henriques, Manager of Fernando J. Henriques, Lda). Also, inflation that increases production costs and reduces the purchasing power of clients, was pointed out as a concern for the footwear sector.

As for lobbying, APICCAPS recently supported the industry by helping creating government solutions for the pandemic's crisis: *"We gave a tremendous support during the pandemics, we helped creating many of the implemented government's solutions (…)" (Dr. Luís Onofre, President of APICCAPS, own translation).*

A near-future difficulty for the footwear sector, is the scarcity of qualified and non-qualified labour. Overall, the interviewed representatives of each firm, mentioned the lack of people that want to join the sector- either because the youngest prefer to go to university, the government does not provide the necessary incentives to join the industry or people do not appreciate to manual work.

APICCAPS classifies the lack of labour as a priority, and is developing solutions to overcome this problem, in a permanent way. The business association's president referred an agreement with the design academy, looking for foreign population that might want to join the industry. Also, the association has tried to create classes in the cities where the industry prevails, to attract young people (interview with Dr. Luís Onofre, President of APICCAPS). In addition, Dr. Carlos Silva (from APICCAPS' studies department), referred a project, developed with Centro de Formação Profissional da Indústria do Calçado, where workers from Cape Verde did training in Portugal and were given the possibility to stay.

Finally, the Executive Director of APICCAPS' studies department, Dr. Alfredo Jorge Moreira, added that the business association is always ahead of the industry's needs, being able to anticipate necessities and solutions:

"APICCAPS has the function and obligation, and have been able to do so, to always be ahead of the industry and enterprises. As such, more than reacting to companies' necessities, we seek to anticipate those needs, find solutions and then go to enterprises and study the advantages, in terms of costs and improvement in competitiveness, those solutions suggest" (Own translation).

Chapter 5
Conclusion

This research studied business associations, focusing on the one acting on the Portuguese footwear industry, APICCAPS. Its aim was to perceive: What are the roles performed by business associations? How have they evolved? Specifically, regarding the footwear sector in Portugal, what are the roles performed by APICCAPS? How do its associates perceive these roles? Is there a homogeneous view between them, or not? Is there a fit between current and future roles of APICCAPS and current and future needs of its associates?

Business associations are institutional actors that represent its members interests by developing individual businesses. Their role is to promote business internationalisation, serving also as intermediaries between industries and the government. They provide technical support, information, advice, training, and services through lobbying, - in turn, government policy improves the collective industry standards, contributing to the overall industry expansion- thus, providing individual and collective services.

Business associations monitor markets there are crucial for their members success. They encourage investment in new technologies and capacities, improving linkages among firms and reducing investment risks. These institutions are believed to find the solutions for enterprises problems and anticipate future needs, support companies' expansion and find new partners. On one hand, SMEs join business associations for social opportunities, as these are more dependent on services, information, and contacts. On the other hand, large enterprises focus on lobbying and representation, seeking legitimacy for their business.

Footwear plays an important role in the Portuguese industrial structure. The sector is essentially located in the north, mainly composed of micro and small enterprises, producing leather, textile, safety, and waterproof footwear. The industry started expanding after the 1970's, becoming, in 2021, the 13th biggest exporter in the world. Portuguese footwear enterprises have been integrating new competencies, aligning technology and quality control.

APICCAPS and CTCP are the major business organisations in the Portuguese footwear sector. The former, created in 1975, represents 4 sectors: footwear's trade and manufacture, components for footwear, leather goods and equipment’s trade and manufacture. The business association acts, mainly, on enterprises’ internationalisation, supports investigation and projects, provides information and potentializes technology, innovation and quality, and sustainability. In turn, CTCP supplies training and qualification, quality control, innovation, and digital manufacturing, through information sharing and the promotion of investigation, development, and demonstration projects.

The internationalisation process increases sales, allows scale economy, job stability and market diversification, being crucial for enterprises development, especially SMEs. For instance, trade missions and reverse trade missions are important programmes that allow companies to make new contacts. Internationalisation seems to be crucial for the Portuguese footwear industry, being this, APICCAPS’ main function.

According to data gathered in the questionnaire and interviews, many enterprises joined the business association, mainly, aiming international expansion. Besides, enterprises seem to value support with labour laws and the provided specialized information about markets, imports, and exports. A few companies also value access to training and/ or embrace innovation projects. Although it is not possible to reach conclusions, data suggests that, despite valuing internationalisation the most, companies recognize the importance of the remaining APICCAPS’ functions, for their business success.

The Portuguese footwear sector has faced many challenges along the years. More recently, the covid-19 pandemic was recognised, during interviews, as an obstacle for the development of enterprises. Per se, APICCAPS has negotiated with the Portuguese government for better financial provisions, by helping creating solutions for the pandemic's crisis. Besides, many enterprises identified the lack of specialized workers as a problem. From the interviews, it was possible to perceive that this may not constitute a current dilemma, but a near-future one. Recognising it, APICCAPS considers it to be a priority. The business association has tried to create classes in the cities where the industry prevails, created an agreement with the design academy looking for foreign population and, jointly with Centro de Formação Profissional da Indústria do Calçado, has attracted Cape Verde’s population to work in the Portuguese footwear sector. Thus, it seems that, beyond responding to its associates' current needs, APICCAPS is concerned about anticipating future ones.

This investigation presents many limitations. First, the little time to gather the data, made it impossible to conduct a pilot testing for the questionnaire and to gather information from more enterprises. The use of a non-conventional rating scale may have confused the questionnaire's respondents, making it difficult to confirm the validity of the results obtained with the questionnaire.

Regarding interviews, most of the interviewed companies joined APICCAPS since its foundation, which precludes understanding how the business association can change an enterprise's path. It was not possible to gather all the information from Rodiro Fábrica de Calçado Lda. Moreover, Dr. Luís Onofre is simultaneously the CEO of a footwear company and president of APICCAPS, making it difficult to grasp in what quality he is contributing. Finally, no microenterprises were available for interview.

Despite the limitations, this study contributes with an exploratory approach to understanding the role of business associations and how far is there a fit between what they offer and what their associates value, which may be a starting point for a more in-depth analysis.

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Appendix

Interviews' guides

As all interviewees are Portuguese, the interviews were administered in Portuguese.

APICCAPS

1. Qual o seu cargo na associação? Como foi designado/eleito?
2. Há quanto tempo integra a APICCAPS? Qual a evolução do seu cargo/papel na associação?
3. Qual é o principal objetivo da APICCAPS? Foi mudando ao longo do tempo?
4. Em termos de representação do setor, mais precisamente, perante o poder público, quais foram os "apoios" mais significativos que a APICCAPS conseguiu obter? Neste momento, planeia ou está a negociar novos apoios?
5. Como se financia a APICCAPS? Qual a percentagem que cada modalidade representa no total das receitas da associação?
6. Que tipo de empresas mais recorrem a projetos de inovação?
7. Neste momento, na perspetiva da associação, quais são as maiores necessidades/dificuldades que as empresas enfrentam?
8. Que medidas está a APICCAPS a tomar ou já tomou, para apoiar as empresas associadas nesse sentido?
9. Tendo em conta que, cada vez mais, a marca é um fator muito importante para o consumidor, o quão importante é, para a APICCAPS, a criação e afirmação/internacionalização de marcas portuguesas de calçado? Como foi evoluindo a estratégia nesta área?
10. Formação é um serviço ao qual as empresas costumam recorrer? Que tipo de empresas recorrem? Que investimento significa para as empresas?
11. Que análise faz, relativamente à qualificação da mão-de-obra no setor?

12. O número de trabalhadores no setor tem vindo a diminuir, desde 2017. Considera que este fator constitui uma dificuldade para as empresas? Se sim, qual a melhor forma para atrair mão-de-obra?
13. No futuro, quais serão as principais necessidades das empresas portuguesas? Quais os planos da APICCAPS para prevenir/combater essas dificuldades?
14. 2018 caracterizou-se como um ano de decréscimo de empresas e pessoas no setor. O que o poderá explicar?

Associates

1. Qual o seu cargo na empresa?
2. Há quanto tempo trabalha na empresa?
3. Qual o número de anos de atividade da empresa? E o que mais marca a evolução da empresa?
4. Em que áreas do calçado se especializa? (senhora, homem, criança, calçado de couro, de segurança, de desporto….) Sempre foram estas as áreas de especialização? Porquê?
5. Tem marca própria? Qual o motivo pelo qual decidiram criar uma marca? Ou porque não? Caso não tenha marca, pensam criar?
6. Exporta a maior parte da sua produção? Exporta com a sua própria marca ou produz para outras marcas?
7. Há quanto tempo a sua empresa é associada da APICCAPS? Tem ideia do custo envolvido?
8. Quais foram os principais motivos que levaram a empresa a associar-se à APICCAPS? Por que motivo mantém esta relação?
9. Em que aspeto a sua adesão à APICCAPS alterou o “caminho” da sua empresa?
10. Já desenvolveu projetos de inovação junto da APICCAPS? Se sim, explorar. Se não, porquê?
11. Que tipo de serviços usufrui enquanto empresa assocada da APICCAPS?
12. Que outros serviços/ atividades gostaria de ver desenvolvidas?
13. Neste momento, quais são as principais necessidades que a empresa enfrenta?
14. Que tipo de dificuldades/ necessidades considera que sejam prováveis que a sua empresa enfrente no futuro?

An English version of the interviews' guides:

APICCAPS

1. What is your role on APICCAPS? How was it designated?
2. How long have you been on APICCAPS? What is the evolution of your role within the association?
3. What's APICCAPS' main objective? Did it change over the years?
4. Relative to lobbying, what were the most significant achievements? At the moment, is APICCAPS planning to negotiate new support?
5. How does APICCAPS self supports? How much (in percentage) is each kind of modality in its total revenues?
6. What kind of enterprises most resort to innovation projects?
7. From APICCAPS' point of view, what are the greatest necessities/ difficulties, enterprises are facing?
8. What is APICCAPS doing about it?
9. Considering that the brand is a growing important factor to the consumer, how important is, for APICCAPS, that its associates affirm and internationalise their own brands? How did this strategy evolve?
10. Is training an appealing service for enterprises? What type of enterprise resorts to training? What kind of investment does it means to them?
11. What is your analysis on qualified labour?
12. The number of employees in the sector have been decreasing, since 2017. Does this constitute a difficulty for enterprises? What is the best way to attract labour?
13. In the future, what might be the biggest enterprises' necessities? What are APICCAPS plans to combat/ prevent it?
14. What could explain the continuous decrease in the number of enterprises and employees in the sector, since 2017?

Associates

1. What is your role on the company?
2. How long have you been working there?
3. What's the number of the company's active years? What marks its path?
4. In what areas of footwear does the company expertise? What it always the same? Why?
5. Does the enterprise have its own brand? Why did you decide to create it? Or why not? Do you think about creating your own brand?
6. Does the company exports most of its production? With its own brand or to other brands?
7. How long has the company been associated with APICCAPS? Are the costs significant?
8. What were the main motives to join APICCAPS? Why keeping that relationship?
9. How did it change the company's path?
10. Have you developed innovation projects within APICCAPS? If so, explore it. If not, why?
11. What kind of services do you enjoy from being APICCAPS' associate?
12. What other services would you like to see developed?
13. What are the main necessities/ difficulties the company is facing?
14. What kind of difficulties do you believe it will face in the future?

Questionnaire's results

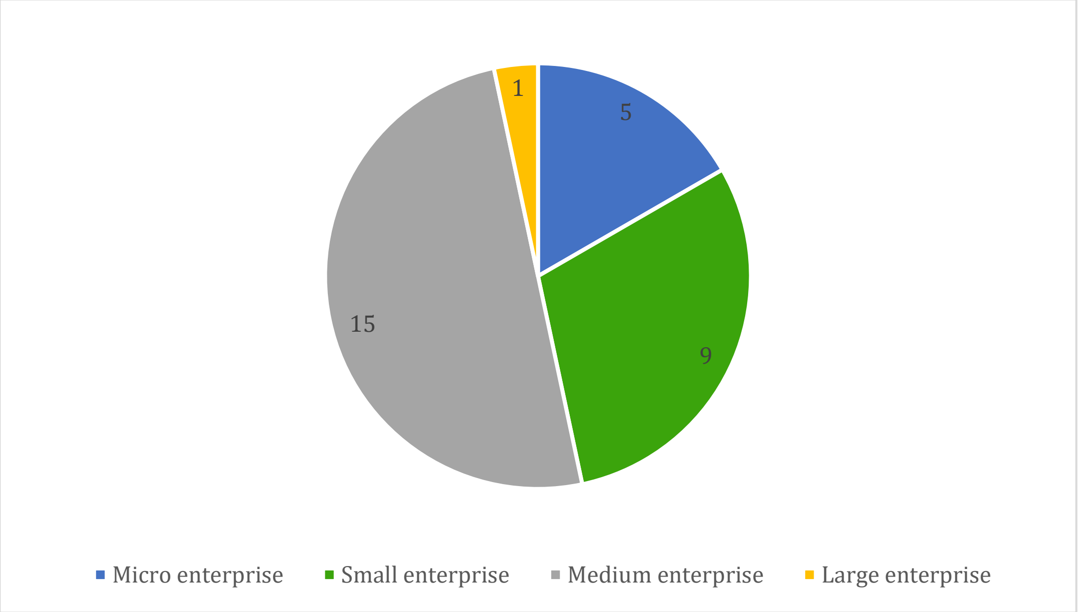

Chart 1 Number of enterprises per dimension (own elaboration from survey)

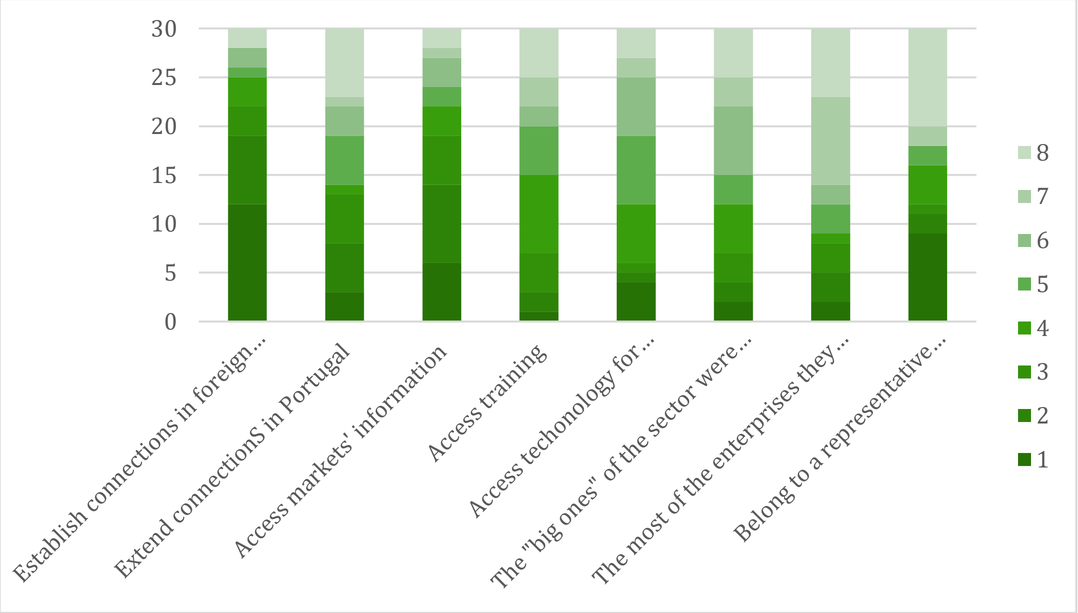

Chart 2 Reasons to join APICCAPS (own elaboration from survey)

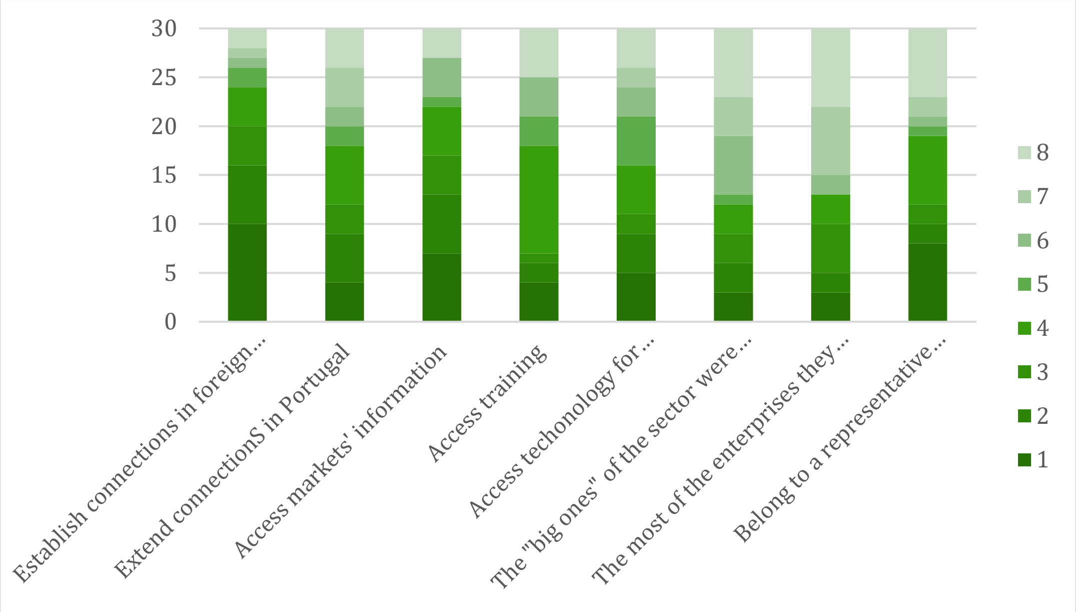

Chart 3 Reasons to belong APICCAPS (own elaboration from survey)

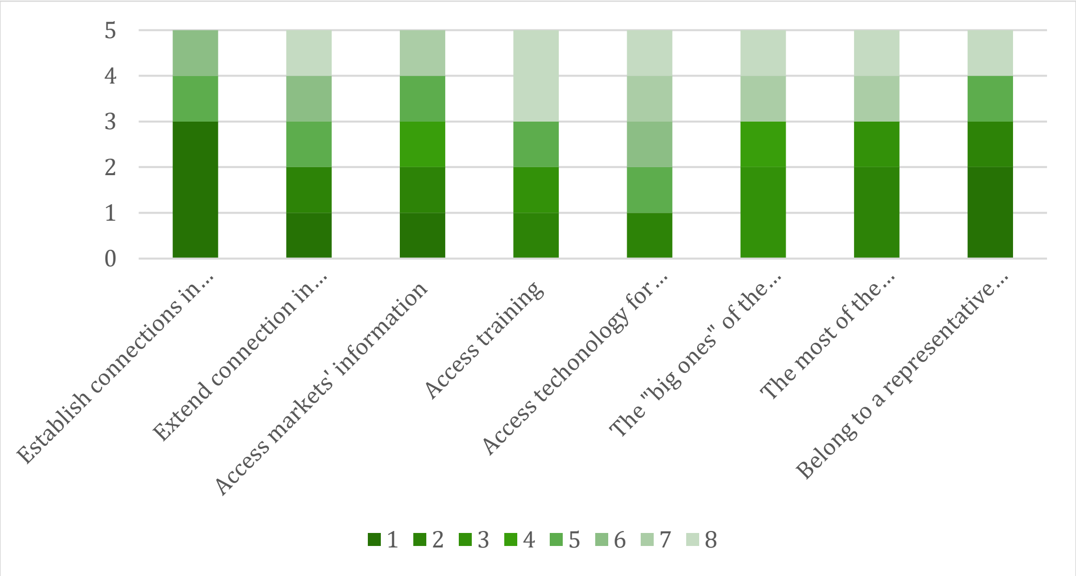

Chart 4 Reasons to join APICCAPS, microenterprises (own elaboration from survey)

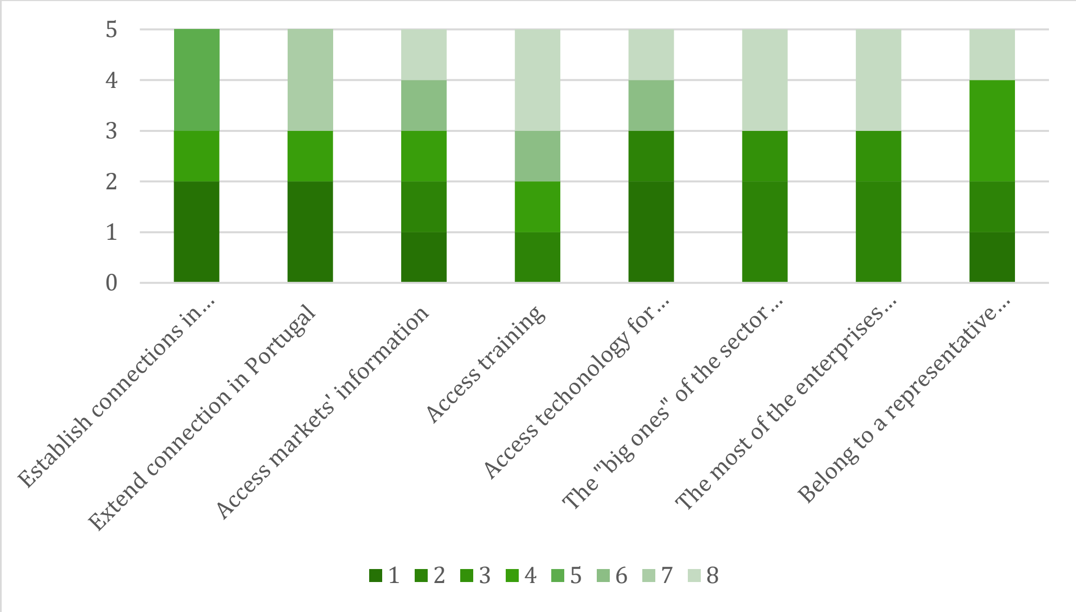

Chart 5 Reasons to belong to APICCAPS, microenterprises (own elaboration from survey)

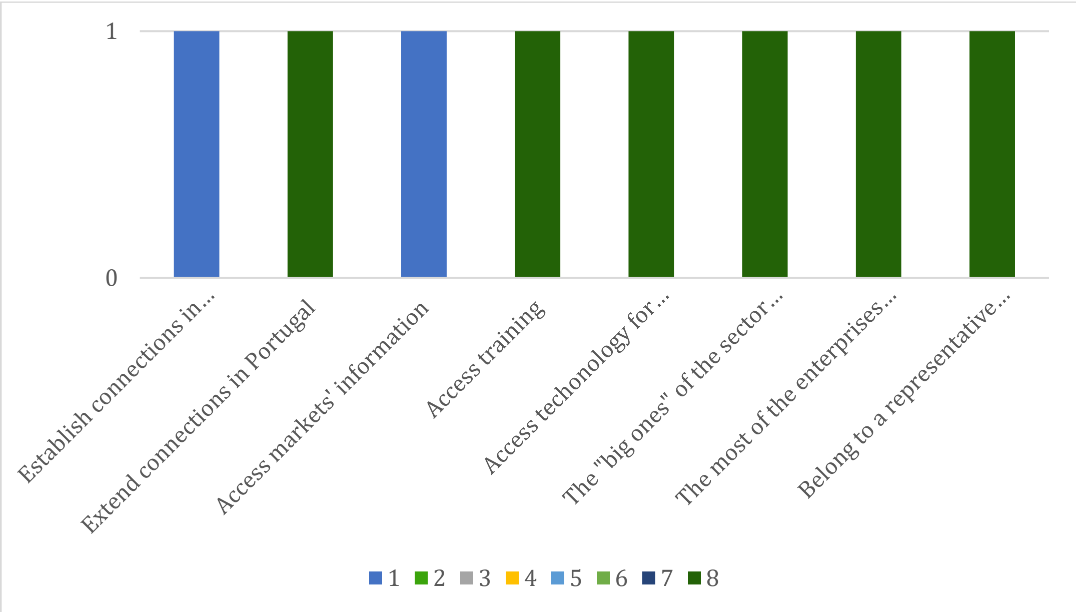

Chart 6 Reasons to join APICCAPS, large enterprises (own elaboration from survey)

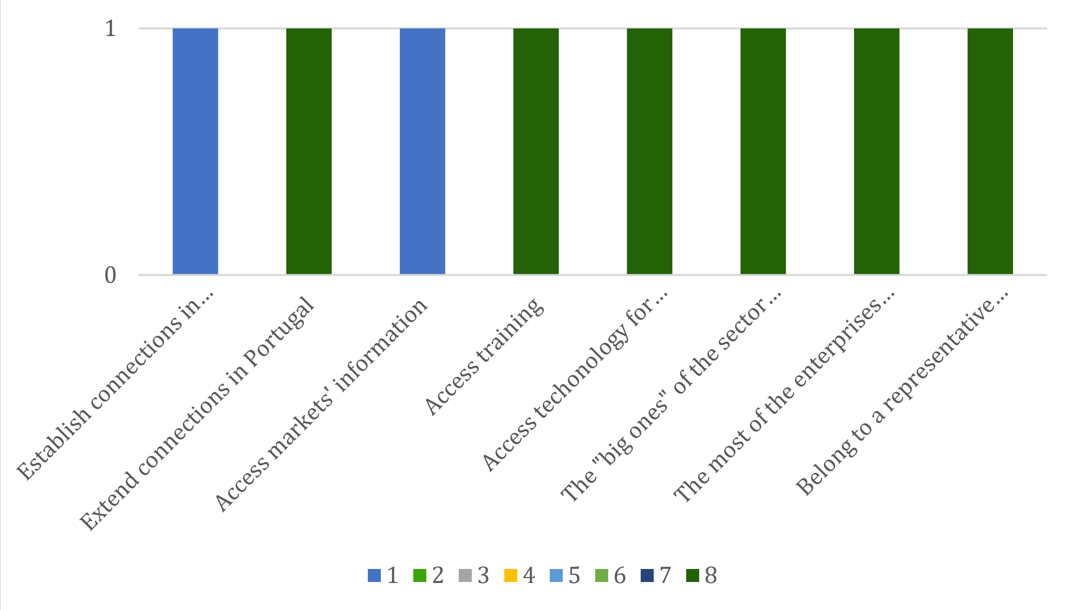

Chart 7 Reasons to belong to APICCAPS, large enterprises (own elaboration from survey)

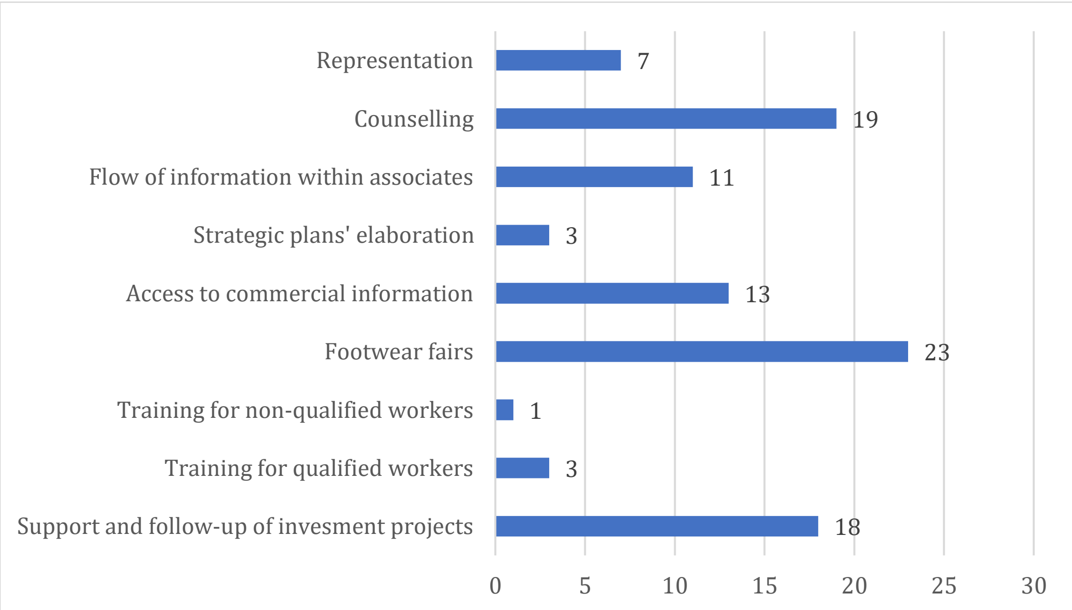

Chart 8 APICCAPS and CTCP'S services (own elaboration from survey)

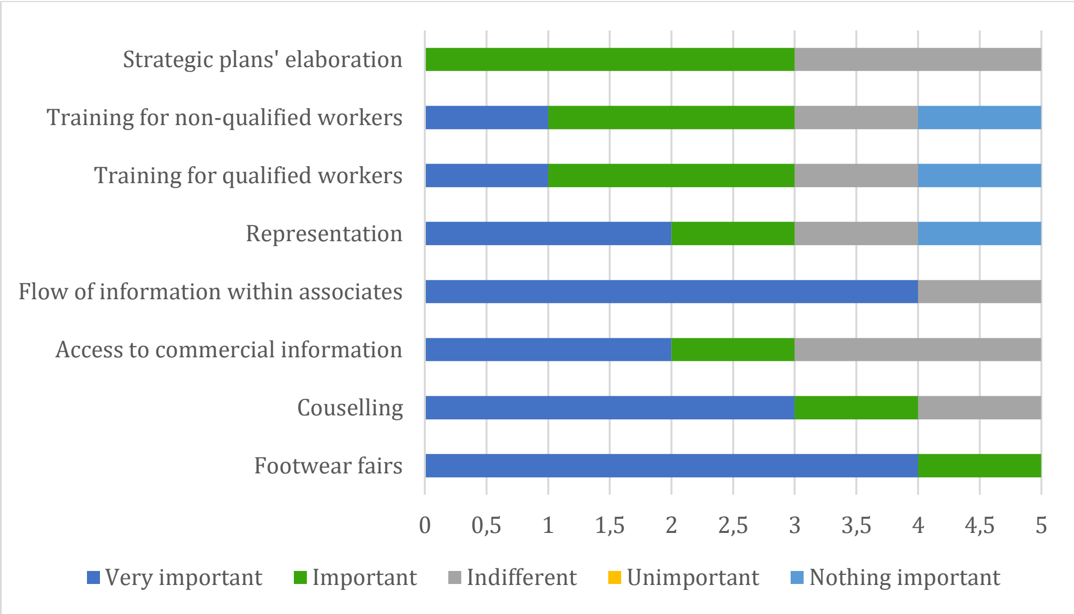

Chart 9 Services' rating, microenterprises (own elaboration from survey)

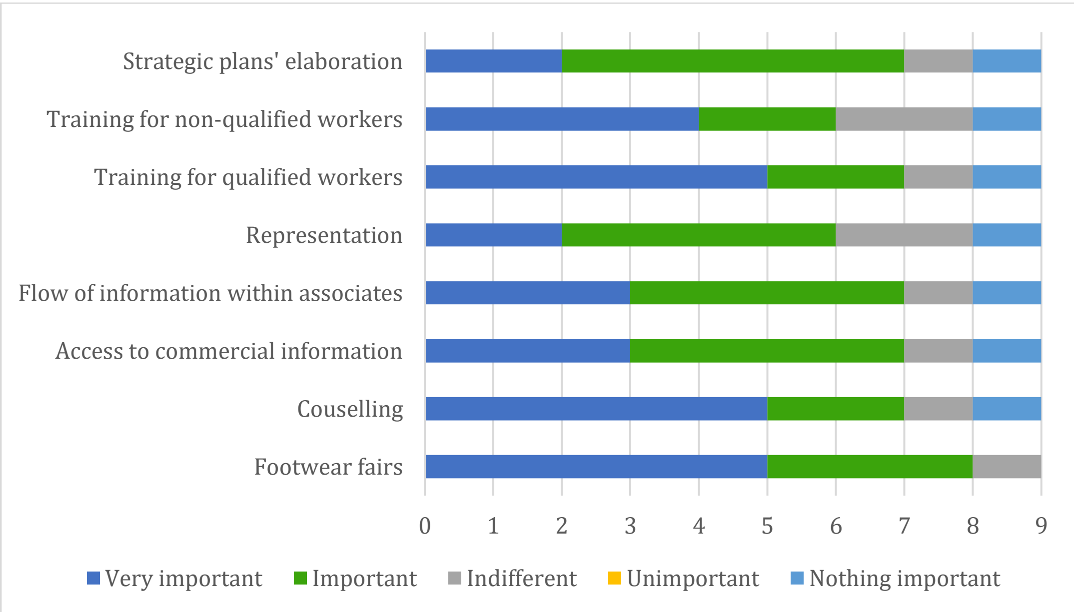

Chart 10 Services' rating, small enterprises (own elaboration from survey)

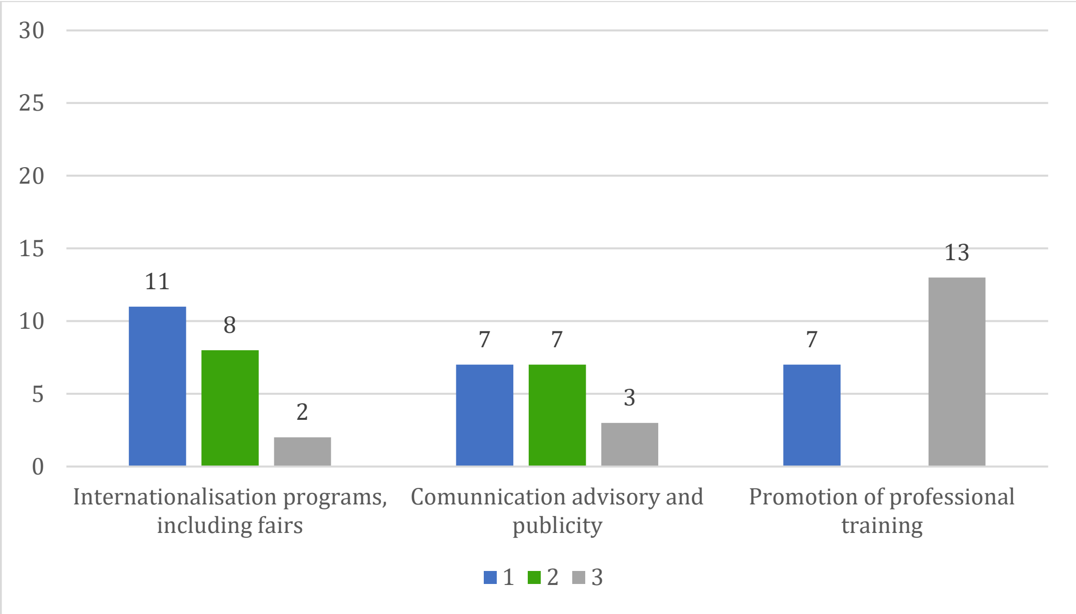

Chart 11 APICCAPS' focus services including "valorização da oferta" services (own elaboration from survey)

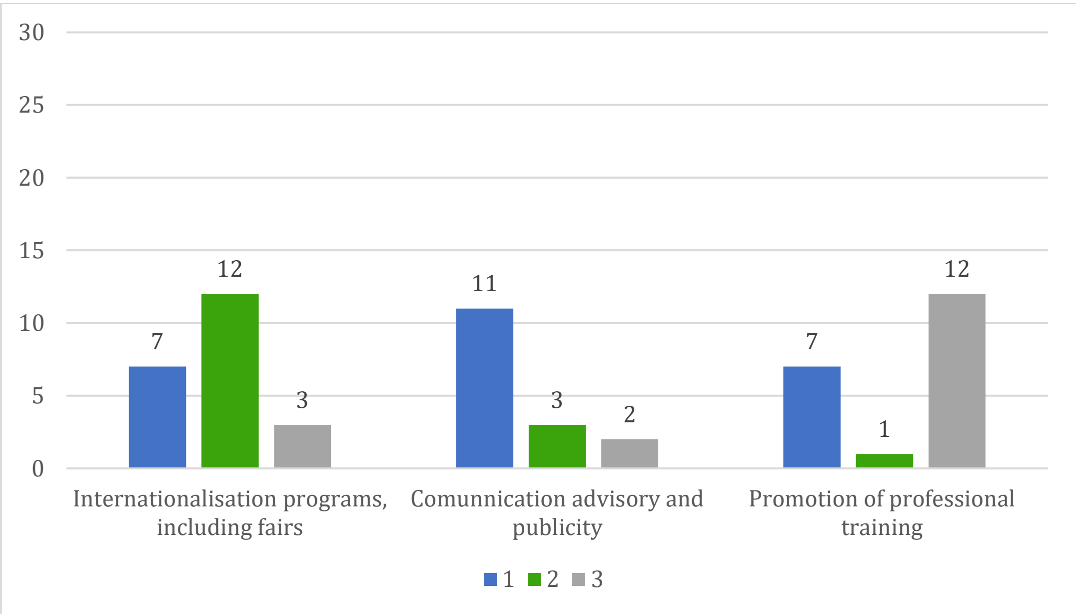

Chart 12 APICCAPS' services ratings including "valorização da oferta" services (own elaboration from survey)

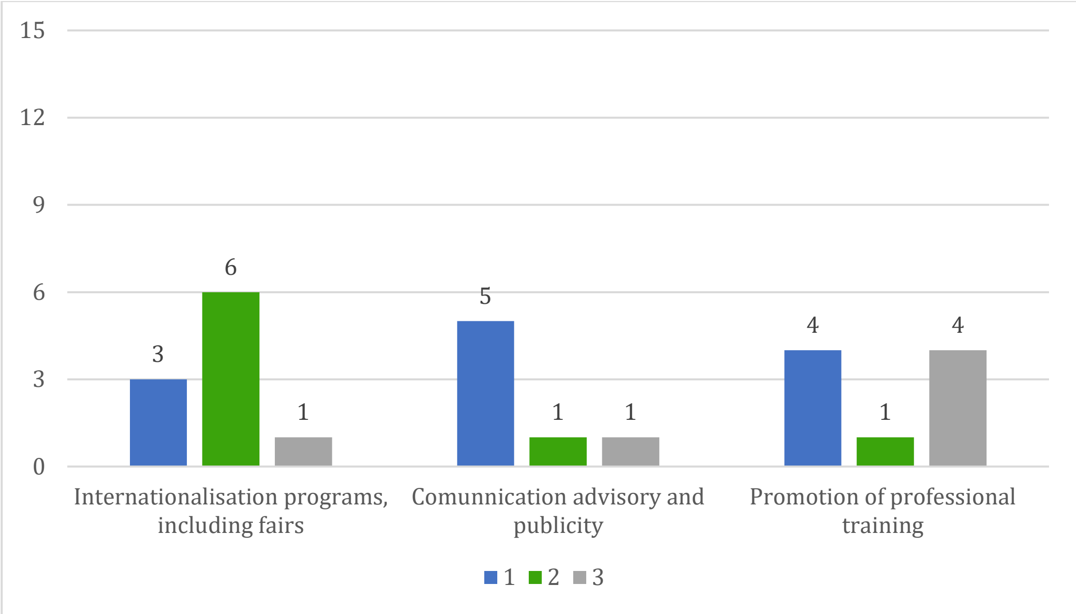

Chart 13 APICCAPS' services ratings including “valorização da oferta” services, medium enterprises (own elaboration from survey)

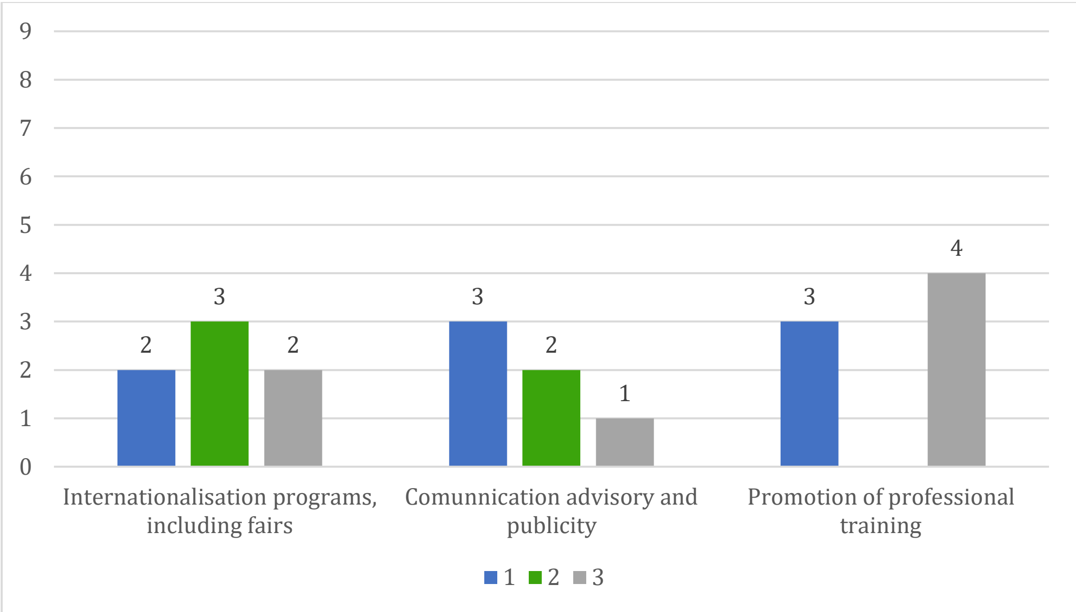

Chart 14 APICCAPS' services including “valorização da oferta” services, small enterprises (own elaboration from survey)

Microenterprises	Investigação NA Internacionalização Internacionalização das marcas investimento em pequenas empresas
Small enterprises	Formação "patronal" - estímulo interno para o desenvolvimento de gestores de topo Formação na previsão a medio/longo prazo adequada ao posicionamento do calçado Português e formar naquilo que deve ser feito para retificar estratégias. Não sei Apoio formação e recursos humanos formacao FORMAÇÃO DE PESSOAS PARA A ÀREA DO CALÇADO QUE ESTÁ A FICAR SEM MÃO DE OBRA Mais publicidade das pequenas/médias empresas FORMAÇÃO AOS TRABALHADORES Feira de Calçado em Portugal
Medium enterprises	RECURSOS HUMANOS FORMACAO Estudos específicos sobre os indicadores económicos-financeiros do setor, em Portugal Laboral recursos humanos FORMAÇÃO Área de recursos humanos Formação transversal sobre procedimentos operacionais e fabrico de calçado formação de trabalhadores não qualificados Nada a apontar. Exploração e potenciação de vendas dos seus associados. Mais formação O cultivo do gosto em trabalhar no calçado Dispositivos médicos e comparticipação do calçado ortopédico Formação de quadros superiores
Large enterprise	Melhoria da acessória aos mercados do continente americano

Table 1 Opened answer- APICCAPS' area of improvement