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- ▶ **A global survey of employer and business membership organizations: Inside impacts and responses to COVID-19**



▶ **A global survey of
employer and business
membership organizations:**

Inside impacts and responses to COVID-19

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Preface

The COVID-19 crisis has shocked the global economy, putting the world on the edge of a major economic recession. Countries, companies, organizations and citizens around the world are experiencing a period of acute unpredictability and instability. Businesses are faced with overwhelming and competing challenges as they navigate the multiple impacts of the pandemic. The most common response in addressing the outbreak has been the immediate adoption of extreme containment measures. This in turn has created an unprecedented need for coordinated action among all stakeholders as the health and the accompanying economic crisis has affected all sectors of the economy and companies of all sizes.

Employer and business membership organizations (EBMOs) (also known as business or trade associations) have played a critical role in supporting the private sector and addressing the intertwined health, economic and social impact of COVID-19. They have been at the frontline helping to shape policy choices to provide safe work places and business continuity measures. As some countries pass the immediate challenges of the sanitary crisis and enter the next phase, business representative organizations need to step up to provide real leadership and advocacy in the process of building back resilience. The private sector will be central to the recovery of employment and for the innovation and investment to drive economies forward. The ability of representative organizations to mobilize the views of the real economy and provide policy solutions is key in this process.

Against this backdrop, EBMOs themselves are not immune to the COVID-19 crisis. The economic contraction and decline in enterprise activity has a direct impact on the income streams of EBMOs. Many EBMOs have experienced or will experience challenges with regards to their membership as some companies traditionally cut “discretionary” costs in times of economic downturn. A vicious cycle may begin of lower membership income weakening EBMOs ability to provide services at a time when they are most needed. Cuts in revenue from services may also hamper the ability to adapt and reinvent service provision and delivery to new circumstances, thus further reducing the value proposition for membership.

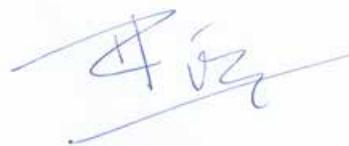
All of this is happening at a time when EBMOs will need to increase, not decrease their role as the voice of the private sector to decision makers.

In a joint effort to understand the real demands and challenges EBMOs are facing financially and operationally, the International Labour Organization – Bureau for Employers’ Activities (ILO-ACT/EMP) and the International Organisation of Employers (IOE) conducted a global survey of EBMOs and collected a total 127 responses from 115 countries. This rich information base, although a snap shot and taken at a time when globally organizations are at different “stages” of the crisis, has enabled us to assess the most pressing needs of EBMOs. It will help the ILO-ACT/EMP and the IOE update our respective offer to them in terms of strategies for resilience and leadership.

This report is the first of its kind to address the challenges faced by EBMOs and to raise awareness about the possible wider implications of the crisis on their operations and functioning. The paradox is that a strong collective advocate for the private sector is needed now more than ever: without effective and functioning EBMOs voicing the needs of business to decision makers, enterprise continuity, economic recovery and ultimately jobs will be at stake.



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About ILO-ACT/EMP

The ILO Bureau for Employers' Activities (ILO-ACT/EMP) is a specialized unit within the International Labour Office that maintains direct and close relationships with EBMOs. EBMOs advance the collective interests of employers at country and regional levels. The ILO-ACT/EMP supports EBMOs to strengthen their governance, services and advocacy capacities so they are better positioned to respond to members' needs.

About the IOE

The International Organisation of Employers (IOE) is the largest private sector network in the world with more than 150 EBMO members and representing the interest of more than 50 million companies. For 100 years, in the social and employment policy debate taking place in the ILO – to which the IOE is the sole representative of business – across the United Nations, G20 and other emerging forums, the IOE has been recognized for its unique expertise, advocacy and influence as a powerful and balanced voice for business at the international level.

▶ Executive summary

Many employer and business membership organizations (EBMOs) are being severely affected by the COVID-19 crisis in terms of their service delivery, membership and income. Nevertheless, they are making great efforts to respond effectively to the crisis as the representative voice of business in engaging with policy makers and supporting members for business continuity. EBMOs are also implementing various measures to minimize the negative impacts of COVID-19 on their organizations and to ensure that they continue to be fully operational and serve their members. These are the main findings of a survey of 127 EBMOs in 115 countries carried out jointly by the International Labour Organization – Bureau for Employers’ Activities (ILO-ACT/EMP) and the International Organisation of Employers (IOE). The findings of the survey critically highlight that EBMOs are turning the crisis into an opportunity as they accelerate their support to members to understand and anticipate the changing business environment and identify innovative ways to provide value to their members.

The findings of the survey underpin and reinforce the messages contained in the joint ILO-ACT/EMP and IOE report “Changing Business and Opportunities for Employer and Business Organizations” published in 2019.¹ The key messages of this report were clear and highlighted that the accelerating pace of change requires EBMOs to adopt a long-term vision based on strategic foresight; strengthen representativeness to reflect the current business landscape; provide the leadership required to anticipate the future of work and business; and innovate to provide solutions and knowledge to member companies. The report further underlined that harnessing these long-term changes requires sustained planning, but the benefits to organizations and their members should not be underestimated. The current sanitary, economic and social crisis has accelerated the pace of this anticipated change and underscored even further the need for business representative organizations to adapt very quickly to changing circumstances in order to remain relevant to their members and play their role in wider society.

The key messages of the EBMO survey responses reveal:

EBMOs are extensively renovating service delivery and multiplying their advocacy efforts, thus demonstrating business leadership

An overwhelming share of EBMOs surveyed (94 per cent) have leveraged available resources to substantially increase their advocacy activities and show business leadership during the crisis. A significant share of EBMOs have engaged in a multi-layered advocacy effort with governments (97 per cent), the media (95 per cent), social media (93 per cent), other business organizations (92 per cent) and bipartite social dialogue (91 per cent). Importantly, EBMOs say that these efforts have largely proven to be effective or very effective.

Additionally, 81 per cent of EBMOs across the world have renovated and adapted their service delivery. The majority are offering virtual advisory, legal and consulting services (83 per cent) whereas more than half have been able to move their training services to an online platform. In response to the COVID-19 crisis, EBMOs are maximizing the use of technology and accelerating the digitalization of their operations and services, making their organizations more fit-for-purpose for the future of work.

The operating capacity of many EBMOs has been affected by government restrictions in the crisis

Government imposed lockdowns, border closures and restrictions in movement have inevitably resulted in many EBMOs operating below normal capacity. Over 30 per cent of EBMOs report that they are operating at 75 per cent capacity or above, and about a quarter report their operation has dropped to 50 per cent capacity. Positively, over 35 per cent of EBMOs are running at full capacity and only 7 per cent of EBMOs are operating at below 25 per cent capacity. However, breakdown by regions show a stark imbalance. EBMOs in Africa are experiencing severe limitations with 14 per cent of EBMOs operating at below 25 per cent of its

¹ ILO and IOE, *Changing business and opportunities for employer and business organization* (Geneva, 2019).

normal capacity and a third of EBMOs at 50 per cent capacity. In contrast, no EBMO in Europe has reduced its operational capacity to below 25 per cent and more than half are working at full capacity.

Curbs or interference by governments are also weakening the ability of EBMOs to operate. Over 40 per cent of EBMOs reported government restrictions such as the suspension of social dialogue institutions (40 per cent), the absence of consultation (38 per cent) and restrictions on EBMO freedoms (22 per cent).

EBMOs are anticipating membership losses but acting swiftly to ensure membership retention

The crisis is affecting EBMOs membership. One third of surveyed EBMOs have already suffered membership losses to-date due to the COVID-19 crisis and others are expect losing members in the coming months.

EBMOs, however, are acting swiftly to minimize this expected loss. 60 per cent of EBMOs are offering incentives, such as making services temporarily free-of-charge (58 per cent) and postponing deadlines to pay membership dues (51 per cent) so that members stay on. EBMOs say that these measures have been effective.

Even though EBMOs are witnessing income decline, they are applying measures to address shortfalls

Government imposed lockdowns and social distancing measures have severely limited the ability of EBMOs to provide face-to-face services, resulting in a decline in income across various sources. An overwhelming majority of EBMOs (83 per cent) reported a drop in overall income.

EBMOs are implementing a variety of cost-cutting measures to counter their reduced income, including cuts in expenses related to staff and external collaborators. Positively, 57 per cent of surveyed EBMOs did not initiate cuts for staff and 61 per cent have not reduced external collaborator costs. Other cost-cutting measures taken by EBMOs include cuts in travel, staff development, office space, sponsorships and donations.

Yet, EBMOs are finding solutions to retain their staff and institutional knowledge

Like any organization, EBMOs have been forced to assess their workforce in light of the COVID-19 crisis. Even though surveyed EBMOs report steps have been taken to reduce staff cost, such as reduced working hour or implementing pay cuts, only 20 per cent have put staff on unpaid compulsory leave or have proceeded with layoffs. Going forward, most surveyed EBMOs do not expect their workforce to contract further in the short-term, but have lower confidence about the medium to longer-term.

EBMOs need to further strengthen their capacities and structures to be better able to assist enterprises during the crisis and recovery

EBMOs report that their three most pressing needs are to strengthen their ability to shape government support for enterprises (62 per cent), their guidance and tools to communicate the role of the private sector in economic and social resilience, growth and prosperity (46 per cent), and their information on business continuity (40 per cent). It is clear that the primary concern for EBMOs at this juncture is safeguarding the viability of enterprises.

EBMOs also foresee changes to their business model and internal structure to meet medium and long-term needs stemming from the crisis. These include enhancing their leadership role during the crisis and recovery (67 per cent), reviewing their membership services (61 per cent), and reviewing their membership strategy to attract more diverse companies and organizations as members (53 per cent).

Conclusions

The findings of the survey highlight that the crisis is acting as a catalyst in driving modernization and innovation in EBMOs. Many EBMOs are renovating their services and intensifying their advocacy. EBMOs are also playing a central leadership role in the response and recovery efforts to the crisis by pulling together all the various parts of the private sector in order to present clear business recommendations. The crisis shows how important it is for EBMOs to continuously stay abreast with new developments, assess different scenarios that are emerging, engage in all relevant processes to build enterprise resilience, and make necessary organizational adaptations.

The crisis has brought into stark relief the fact that EBMOs need to review their fitness to serve new and emerging types of business, invest in people, develop new products and strategies to attract newly emerging businesses (e.g. platform economy, technology start-ups) and help traditional models to grow and compete. COVID-19 is, to a certain extent, accelerating the speed of change in businesses. These global trends offer an unprecedented opportunity for EBMOs to reinvigorate the collective power of business and shape the future. Companies are looking to EBMOs to engage with policymakers to shape the regulatory environment for future-ready economies and societies, find innovative solutions to emerging issues affecting the workplace and harness the productive potential of change to the benefit of all.

Global coordination and partnership have never been more important than today in view of the truly global dimension of the COVID-19 pandemic. The sharing of experience and international cooperation is key to support EBMOs in their response to the COVID-19 crisis. Global networks have an important role to play in facilitating peer-to-peer learning, supporting cooperation and amplifying the messages of EBMOs at international levels. The digitalization of meetings and conferences has greatly enhanced the ability for EBMOs to participate in international policy discussions and meetings at no cost, and has strengthened the ties between EBMOs and their global and regional membership organizations.

The ILO-ACT/EMP and the IOE, with their expertise, resources and networks, play a key role in supporting EBMOs so they can continue to add value to their members and assist with efforts to chart a path to a “better normal”.

▶ 1. About the survey

The International Labour Organization – Bureau for Employers’ Activities (ILO-ACT/EMP) and the International Organisation of Employers (IOE) conducted a global survey to assess the organizational challenges that employer and business membership organizations (EBMOs) are facing as a result of the on-going COVID-19 crisis.² Responses to an online survey were received between 18 May and 4 June 2020 from 127 EBMOs in 115 countries across five regions – Africa, the Americas, Arab States, Asia and the Pacific, and Europe and Central Asia.³ The survey gathered up-to-date intelligence about the organizational wellbeing of EBMOs across four areas: membership, income, services and needs for technical assistance.

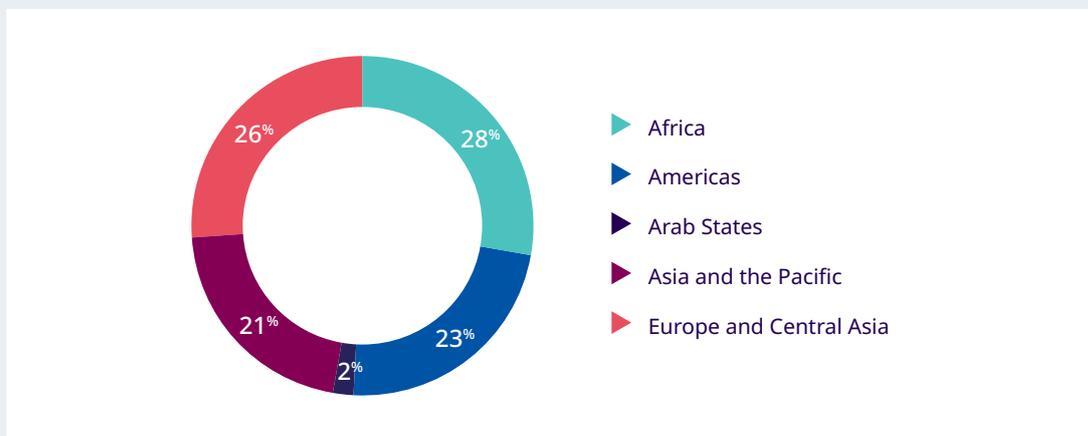
This report presents the key findings and insights of the survey at the global and regional levels, and highlights the most pressing needs expressed by EBMOs. Details of regional overviews of the survey findings and the survey questionnaire are annexed to this report.

Survey demographics

Of the total responses, the highest share came from Africa (28 per cent), followed by Europe and Central Asia (26 per cent), the Americas (23 per cent), Asia and the Pacific (21 per cent) and Arab States (2 per cent) (see figure 1).⁴

▶ FIGURE 1.

Survey sample by region



Over half of all responding EBMOs reported that their membership includes companies and business federations or associations, while 32 per cent of EBMOs have only business federations or associations in their membership and 16 per cent have only companies as members (see figure 2).

2 The survey reached the most representative EBMOs in a given country. The sample included the IOE’s member federations and more broadly the ILO’s employers’ constituents. Business associations representing specific groups, such as sectoral associations, regional or provincial associations were not included in the survey.

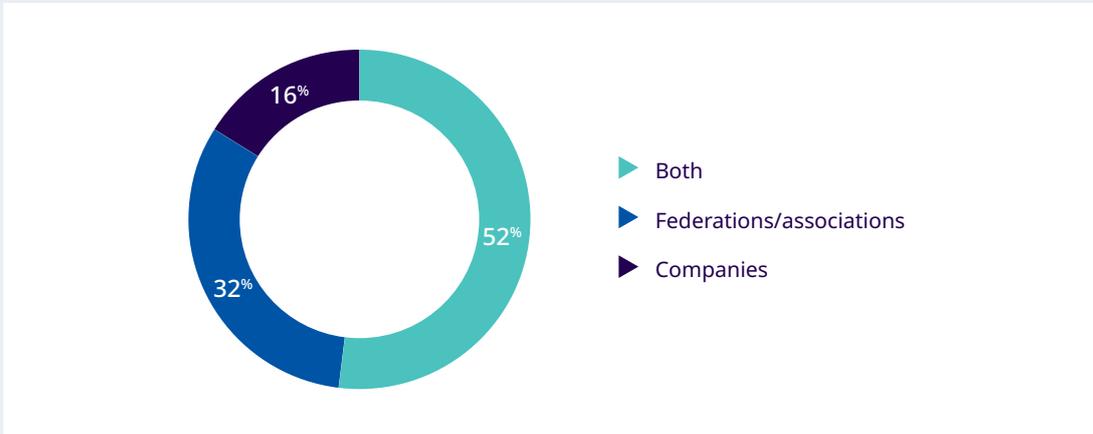
3 In considering the results of study, it should be taken into account that countries and regions were to a varying extent affected by COVID-19 during the survey period and also that the peak periods of the pandemic varied from one region to another.

4 Regional analysis was conducted for each region except the Arab States considering that only three EBMOs in that region responded to the survey.

▶ FIGURE 2.

EBMO membership type

Panel A. Global results



Panel B. Regional results



▶ 2. COVID-19’s impact on EBMO membership

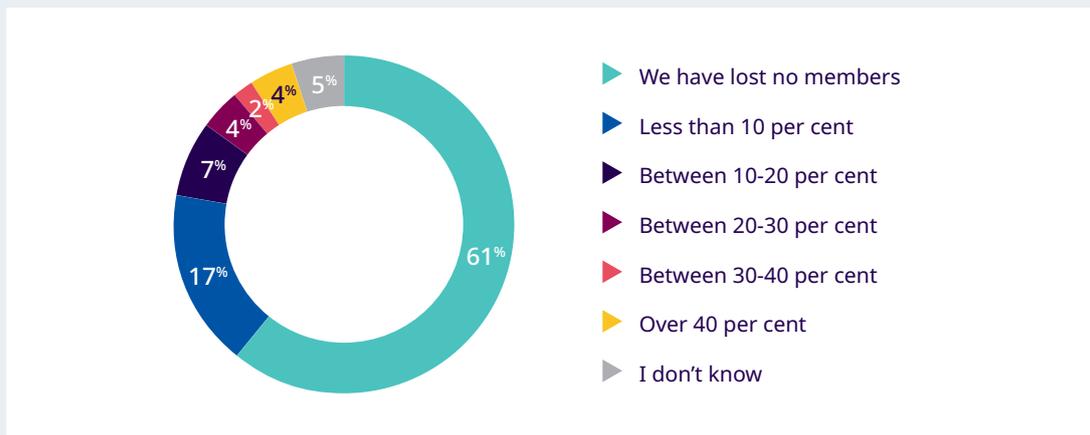
EBMO membership currently remains intact but showing signs of fragility. The majority of EBMOs globally (61 per cent) responded that they had no membership loss to-date (see figure 3). However, 17 per cent of surveyed EBMOs reported a membership reduction of 10 per cent or less, 7 per cent lost between 10 to 20 per cent of members, and 4 per cent lost over 40 per cent of members.

There is significant variation in membership loss at the regional level. The region with the highest share of EBMOs that recorded stable membership is Europe and Central Asia (76 per cent), followed by Africa (67 per cent), Asia and the Pacific (54 per cent) and the Americas (45 per cent).

▶ **FIGURE 3.**

Membership termination as a result of COVID-19

Panel A. Global results



Panel B. Regional results



- ▶ We have lost no members
- ▶ Less than 10 per cent
- ▶ Between 10-20 per cent
- ▶ Between 20-30 per cent
- ▶ Between 30-40 per cent
- ▶ Over 40 per cent
- ▶ I don't know



We have been able to add value for our membership through our representation on national committees which has enabled us to boost our direct advocacy efforts. By so doing, we have been able to affect significant decisions relative to the re-opening of business sectors. This has led to non-members contacting [our organization] and has led to new membership opportunities. Our value proposition has been strengthened.

▶ *EBMO survey respondent*

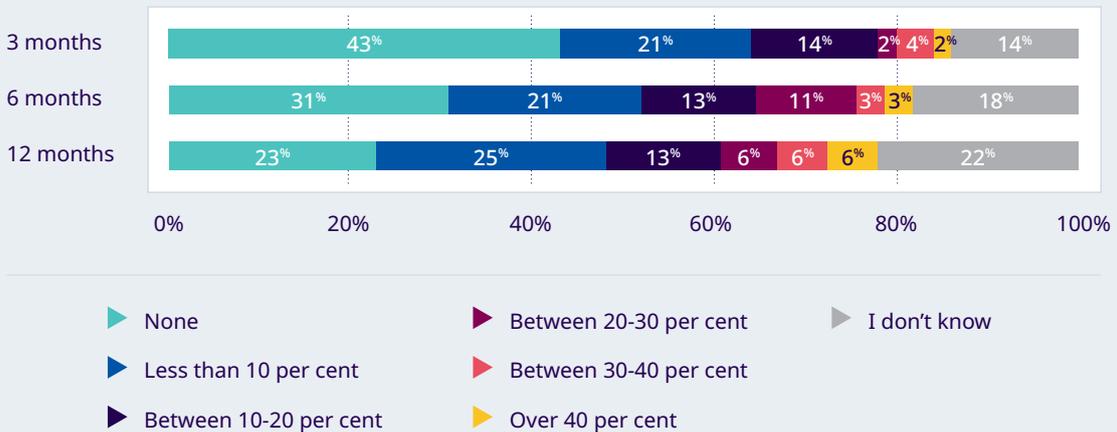
However, EBMOs are anticipating future membership loss. The medium to longer-term prospects portray a deeply contrasting picture, with 57 per cent of EBMOs surveyed expecting membership reductions or expressing uncertainty in the next three months, 69 per cent in the next six months and 77 per cent in the next year (see figure 4).

Approximately a quarter of EBMOs expect their membership to decrease by less than 10 per cent in the next three, six months and 12 months. About 15 per cent of EBMOs report that their membership is likely to decrease by 10 and 20 per cent over the same period.

Notably, a relatively high share of EBMOs do not see themselves in a position to make an estimation of future membership reduction owing to the crisis, with more than 20 per cent of EBMOs unable to predict membership reductions in the next 12 months, which reflects the level of uncertainty.

▶ **FIGURE 4.**

Extent of expected reduction in EBMO membership in the next 3, 6 and 12 months, global results

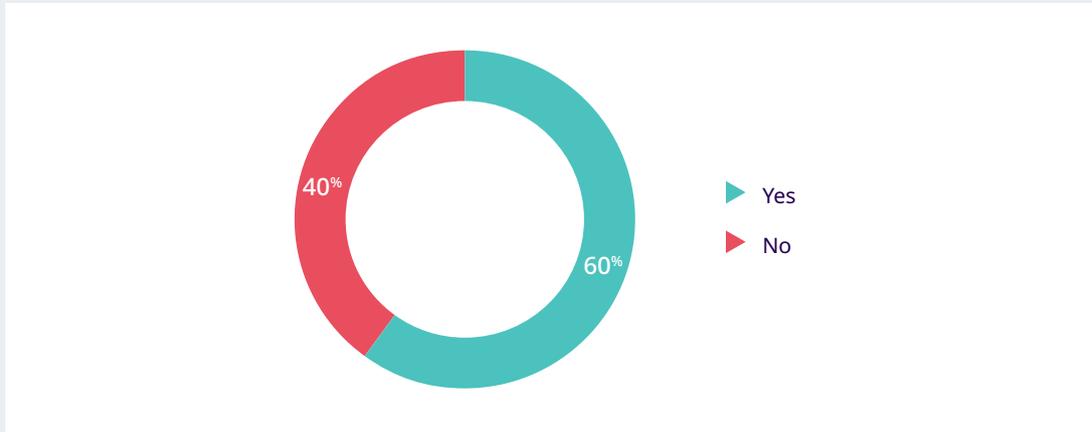


EBMOs are acting swiftly to minimize expected membership loss. Globally, 60 per cent of EBMOs are offering various incentives to members to retain their membership despite the existing financial strains (see figure 5). The share of EBMOs offering incentives differs by regions as follows: EBMOs in Asia and the Pacific (65 per cent) followed by the Americas (62 per cent), Europe and Central Asia (58 per cent), and Africa (56 per cent). The higher share of incentives offered by organizations in Asia and the Pacific and the Americas seems to reflect the effort of EBMOs to address the increased share of membership loss in these two regions.

▶ FIGURE 5.

EBMOs that are offering incentives to retain members during the COVID-19 crisis

Panel A. Global results



Panel B. Regional results

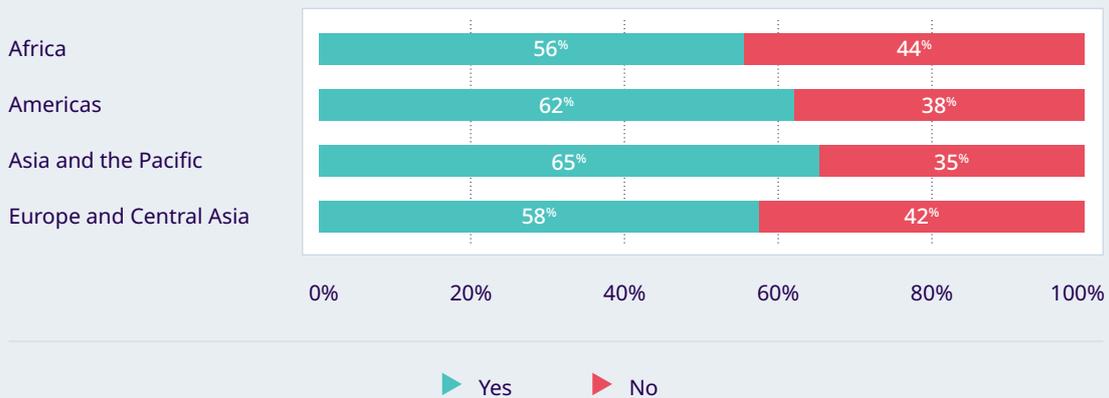


Figure 6 shows the most frequent incentives offered are making services free-of-charge (58 per cent of EBMOs) and postponing the deadline to pay membership dues (51 per cent). "Other" incentive measures provided (36 per cent) include the ability to make payments in instalments and a temporary suspension of membership fees. Finally, a near third of EBMOs have offered temporary reduction or discounts in membership fees. The survey respondents reported that these measures have predominately been effective (47 per cent) or partially effective (52 per cent).

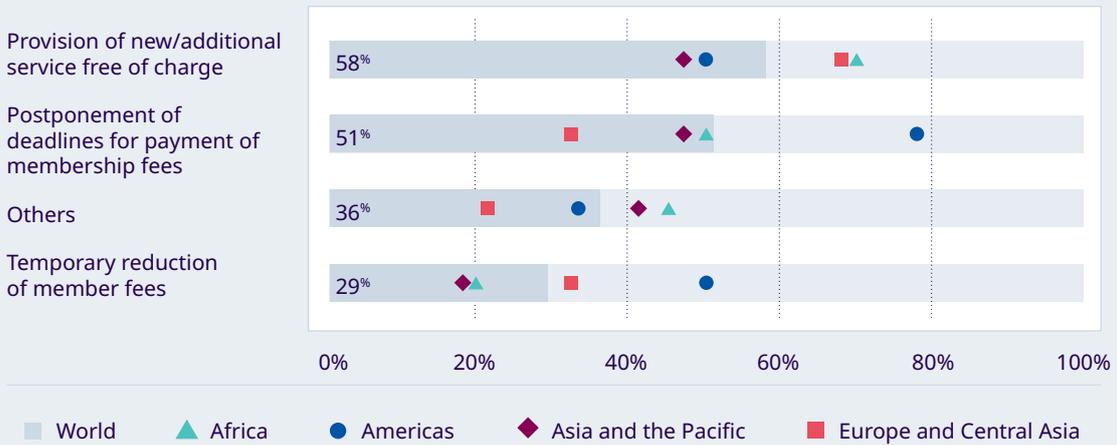


Under the influence of the health crisis brought by COVID-19, which at the same time caused an economic crisis, our organization invited all interested companies to join for free so that we could provide them with legal assistance, advice and information to prevent the occurrence of COVID-19 in the workplace as well as to provide them with guidance on implementation of measures and recommendations adopted by the Government with a special emphasis to the set of measures for financial support to companies.

▶ *EBMO survey respondent*

▶ **FIGURE 6.**

Types of incentives offered to retain members during the COVID-19 crisis, global results by region



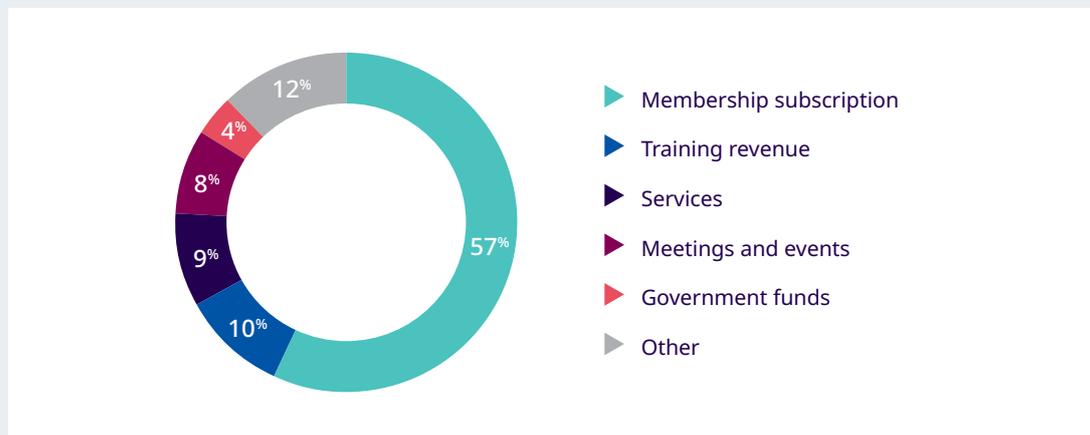
▶ 3. COVID-19's impact on EBMO income

Prior to COVID-19, income sources for surveyed EBMOs consisted of the following: membership subscriptions (57 per cent); training revenue (10 per cent); services such as representation, human resources services, legal and advisory services (9 per cent); meetings and events (8 per cent); government funding (4 per cent); and "other" sources such as rent, donations, grants, sponsorship, and technical cooperation funds among others (12 per cent) (see figure 7).

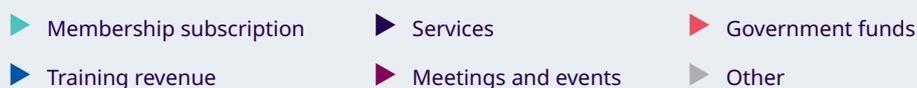
▶ FIGURE 7.

Average composition of EBMO income sources prior to COVID-19

Panel A. Global results



Panel B. Regional results

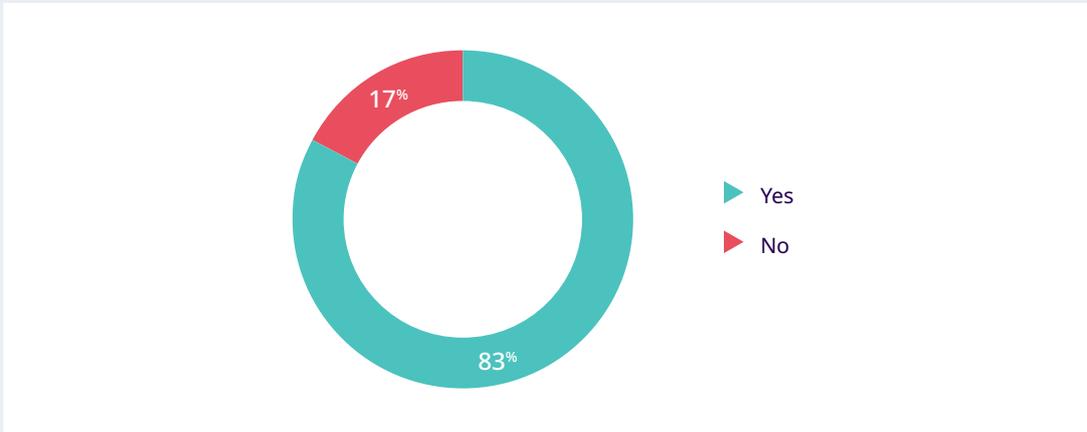


More than 80 per cent of EBMOs have seen their income shrink. Of real concern is the scale of the income decline – fully 80 per cent of EBMOs globally report a plunge in income during March and April 2020. At the top end, losses were cited by 97 per cent of EBMOs surveyed in Africa and 93 per cent in the Americas, followed by 73 per cent in Asia and the Pacific, and 64 per cent in Europe and Central Asia (see figure 8).

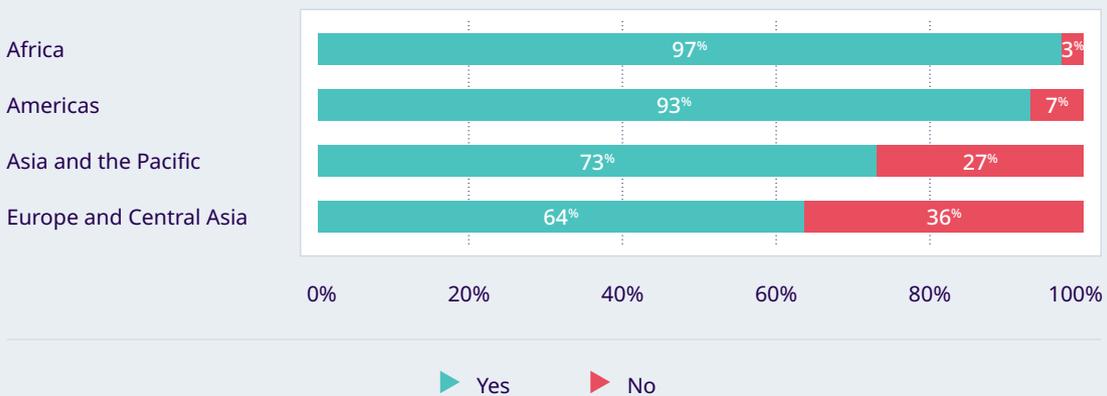
▶ FIGURE 8.

EBMOs that report income decline as a result of COVID-19

Panel A. Global results



Panel B. Regional results



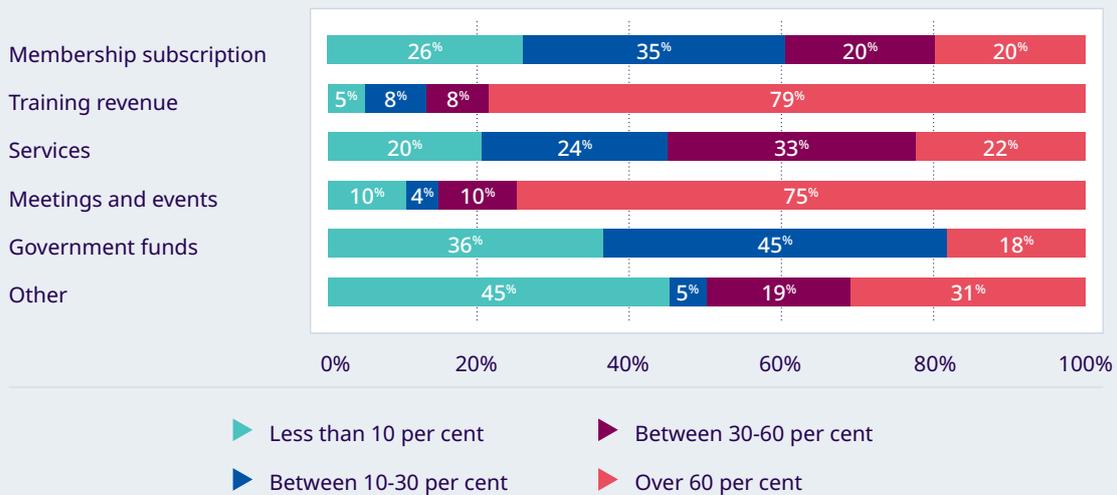
Government imposed lockdowns and social distancing measures have severely limited the provision of face-to-face services, resulting in a sharp decline in income from various sources for EBMOs. Over the period of March and April 2020, 79 per cent of EBMOs worldwide experienced a decline in training revenue of more than 60 per cent (see figure 9). Additionally, 75 per cent of EBMOs globally saw their income from meetings and events reduced by more than 60 per cent. Income from services, including representation, human resources services, legal and advisory services, were also reduced by over 60 per cent for some 1 in 5 EBMOs and between 30 and 60 per cent for a third of EBMOs. Funds from the government, while representing a smaller share of EBMO income, also dipped substantially. Almost 1 in 5 of those EBMOs receiving government funds reported a decrease of 60 per cent and a nearly half of those EBMOs reported a drop of government funds of between 30 and 60 per cent.

Revenue from membership dues, which continue to be the largest revenue source for EBMOs globally by far, have declined less other income streams, with 1 in 3 EBMOs reporting a drop of 10 to 30 per cent, 1 in 5 citing a decline of 30 to 60 per cent, and similarly 1 in 5 EBMOs indicating a decline of more than 60 per cent. This result may be attributed to the billing schedule of membership dues, which generally are paid during the first quarter of the year. Thus, it is likely that the majority of EBMOs were able to secure membership subscriptions for 2020 prior to the declaration of the COVID-19 pandemic by the World Health Organization

on 11 March 2020.⁵ However, EBMO leaders have voiced considerable concern that subscription rates for 2021 will be substantially reduced as businesses continue to struggle with recovery efforts and prioritize meeting essential costs. The relative financial resilience of EBMOs today is thus likely to be overturned next year with the possibility of financially distressed EBMOs being forced to drastically downsize or merge with other business membership organizations.

▶ **FIGURE 9.**

Extent of decline in EBMO income as a result of COVID-19, global results by main income source



EBMOs predict falling income in the short, medium and longer term. The vast majority of surveyed EBMOs foresee their incomes dwindling in the next 12 months (see figure 10). In the short-term (next three months), about one third of EBMOs anticipate a drop in income by 10 to 30 per cent while about 1 in 5 EBMOs raise the alarm by indicating a possible drastic decline of more than 60 per cent. In the medium-term (next six months), over a third of EBMOs expect their incomes to drop by 10 to 30 per cent, and a quarter of EBMOs anticipate income loss of 30 to 60 per cent. In the longer-term (next 12 months), nearly one third of EBMOs anticipate their income to fall by 10 to 30 per cent and 1 in 5 EBMOs foresee a 30 to 60 per cent decline.

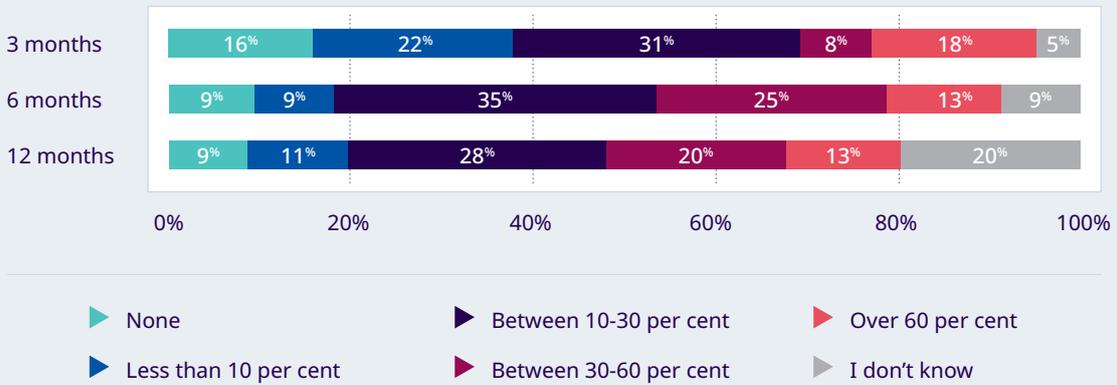
A relatively low share of EBMOs are more optimistic and foresee only a negligible impact of COVID-19 on their income. Less than 16 per cent of surveyed EBMOs report that there will be no impact in the short-term, and less than 10 per cent of EBMOs cite no impact in the medium to longer-term.

Of concern, here too, is the uncertainty about the future as reflected in the relatively high share of EBMOs (1 in 5) that see themselves unable to make an estimate of income decreases in the coming 12 month period.

⁵ WHO Director-General's opening remarks at the media briefing on COVID-19, 11 March 2020.

▶ FIGURE 10.

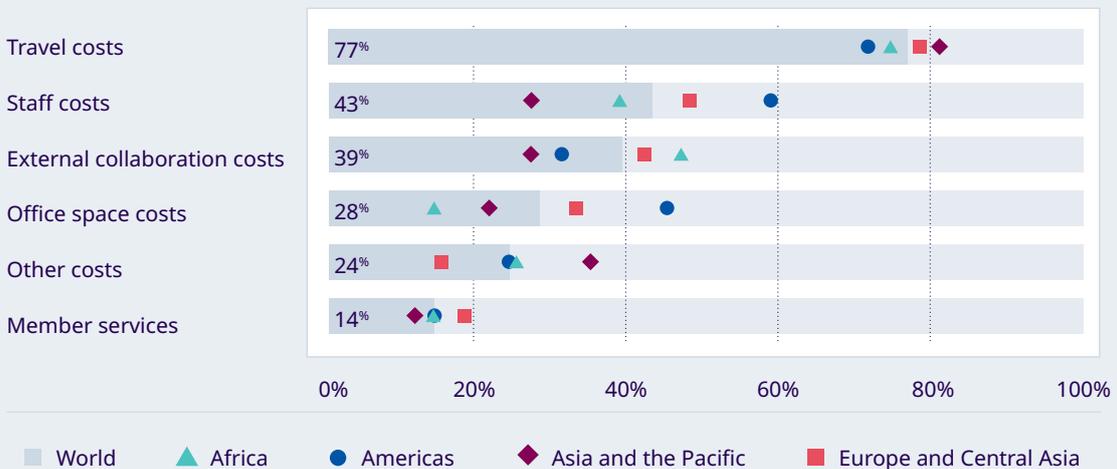
Extent of the expected decrease in EBMO income in the next 3, 6 and 12 months, global results



EBMOs have implemented several cost-cutting measures to counter their reduced income. Of surveyed EBMOs, 77 per cent of EBMOs have reduced travel cost, which seems to largely reflect savings that organizations have gained as a result of lockdown measures and the shut-down of the aviation industry. Positively, 57 per cent of surveyed EBMOs did not initiate cuts for staff and 61 per cent have not reduced external collaborator costs. However, others have pursued human resources related cost-cutting measures, which are likely to reduce the talent, capacity and ability of the EBMO to source necessary expertise during a time when the need for representation, advocacy, and advisory services are at record highs. “Other” cost-cutting measures mentioned by EBMOs include cuts in staff development, sponsorship to young people and women, and donations and financial support to partners. The survey results also confirm that the least adopted cost-cutting measure is member services, showing that EBMOs are using their narrowed resource base to serve their members to the greatest extent possible (see figure 11).

▶ FIGURE 11.

Implemented cost-cutting measures by EBMOs to respond to income reduction, global results by region



Most EBMOs do not have financial reserves. Less than 40 per cent of surveyed EBMOs have financial reserves or access to alternative or external funding sources to cope with the impact of COVID-19 (see figure 12). The limited budget underscores potentially grave cash flow problems EBMOs will encounter as the crisis becomes protracted and their future income deteriorates. At the regional level, half of surveyed EBMOs in Asia and the Pacific have space for financial manoeuvring, whereas EBMOs in Africa report the least financial preparedness with only a quarter reporting the availability of reserves.

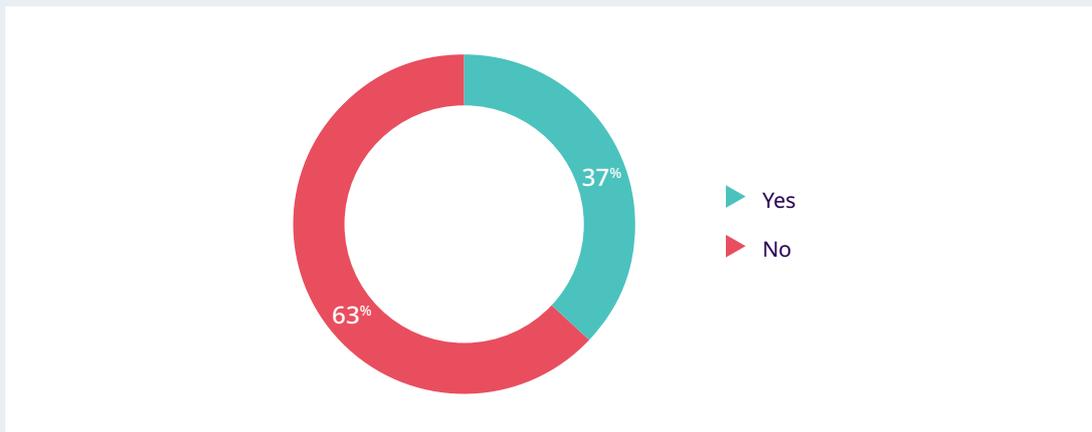
Of EBMOs who had access to financial reserves, the large majority had savings (89 per cent). Some 32 per cent reported access to grants and 17 per cent cited access to loans.

Positively, nearly 90 per cent of EBMOs indicated that funds available were sufficient to remain operational for the next six months. The entirety of EBMOs in Europe and Central Asia were confident that the level of their existing financial reserves or alternative or external funding was sufficient. The least confident region was the Americas where 27 per cent of EBMOs indicated that funding was insufficient for half a year of operational viability.

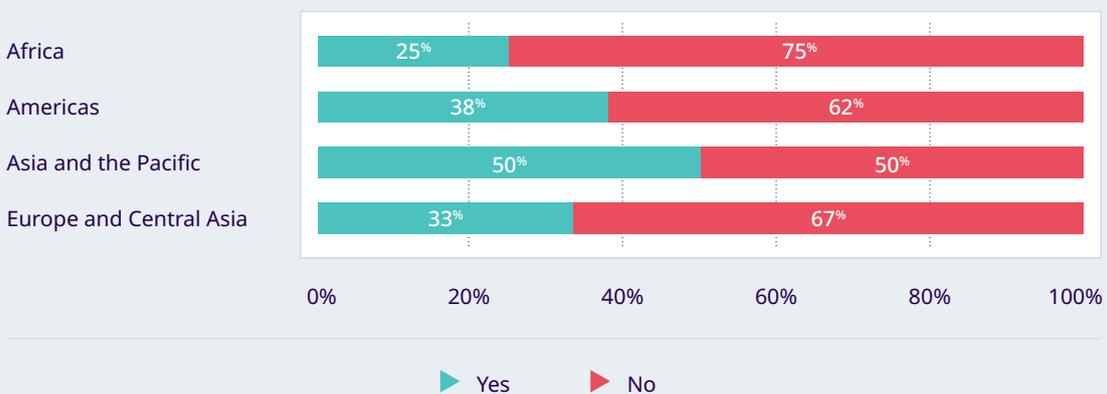
► FIGURE 12.

EBMOs that have financial reserves or access to alternative funds

Panel A. Global results



Panel B. Regional results



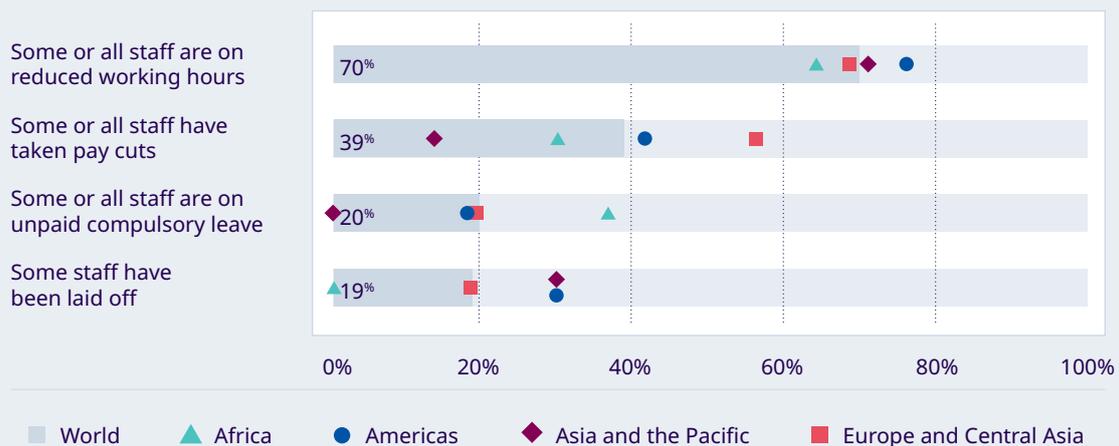
▶ 4. COVID-19's impact on EBMO workforce

EBMOs have been forced to downsize their workforce. However, EBMOs surveyed show that a cautionary approach is being taken regarding staff reductions. Of those who have taken steps to reduce staff costs (42 per cent of EBMOs surveyed), 70 per cent reduced working hours and almost 40 per cent implemented pay cuts (see figure 13). Only 20 per cent have opted to put staff on unpaid compulsory leave or proceed with layoffs.

Reduced working hours were most common among EBMOs in the Americas (76 per cent). Implementing pay cuts were the most popular in Europe and Central Asia (56 per cent), whereas it was least common in Asia and the Pacific (14 per cent). While no EBMOs in Asia and Pacific put staff on unpaid compulsory leave, more than a third of EBMOs in Africa resorted to this measure. The two regions reporting the highest share (29 per cent) of laying staff off were the Americas and Asia and the Pacific.

▶ **FIGURE 13.**

EBMO workforce changes as a result of COVID-19, global results by region



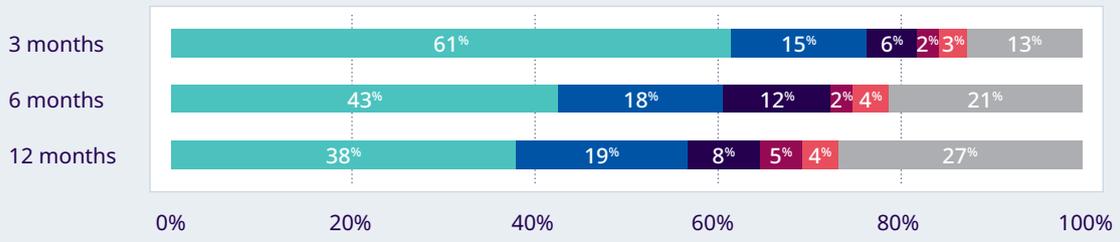
The survey results show that EBMOs are looking for solutions to retain their staff. Of 127 EBMOs surveyed, only ten globally have reported layoffs of their workforce in COVID-19 related cost-cutting measures. Four EBMOs laid off 1 to 10 per cent of staff, three EBMOs laid off 10 to 20 per cent, one EBMO laid off 30 to 40 per cent, and one EBMO laid off more than 40 per cent. 90 per cent of EBMOs that laid off staff experienced a decline in income and did not have any financial reserves or access to alternative sources of funds.

Going forward, surveyed EBMOs largely do not expect their workforce to contract further in the short-term but expressed lower confidence about the medium to longer-term. The share of EBMOs indicating that their current staff-levels will be unchanged in the next three months is approximately 60 per cent (see figure 14). This figure declines to 43 per cent using a six months horizon and subsequently drops to 38 per cent for the next 12 months. Similarly, EBMOs citing that they will reduce up to 25 per cent their total workforce is highest for the medium term (six months) at nearly a third of EBMOs followed by over a quarter of EBMOs in the longer-term (12 months).⁶

⁶ To calculate the share of EBMOs that expect to reduce up to 25 per cent of their workforce, responses for "less than 10 per cent" and "between 10-25 per cent" have been combined.

▶ FIGURE 14.

Extent of EBMO workforce contraction in the next 3, 6 and 12 months, global results



- ▶ None
- ▶ Less than 10 per cent
- ▶ Between 10-25 per cent
- ▶ Between 25-50 per cent
- ▶ Over 50 per cent
- ▶ I don't know

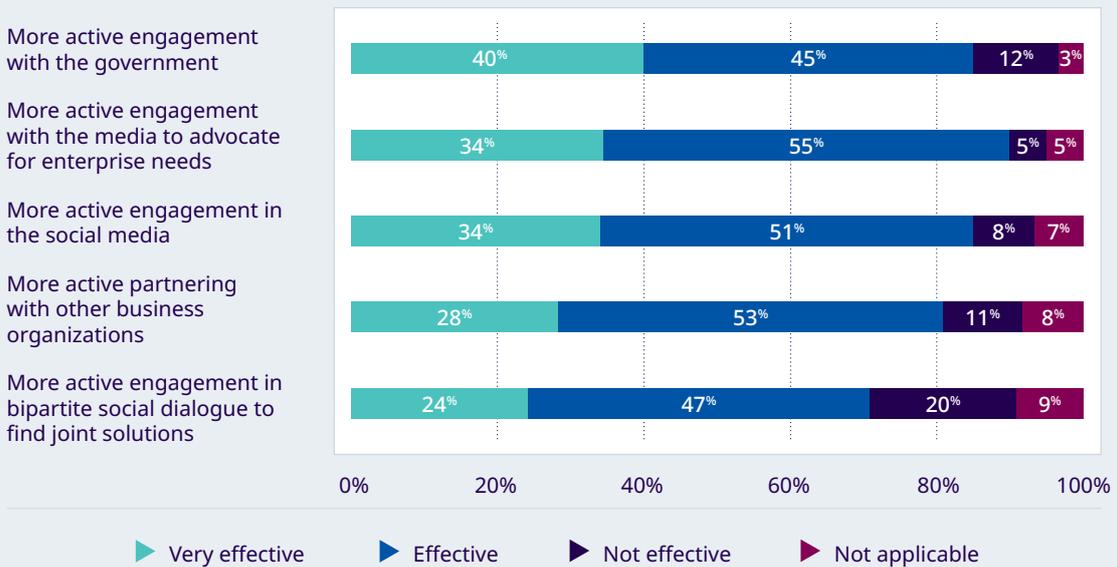
▶ 5. COVID-19’s impact on EBMO advocacy activities and services

An overwhelming 94 per cent of EBMOs reported an increase in advocacy activities, which in turn increased their visibility during the crisis. A significant share of surveyed EBMOs engaged in multi-layered advocacy efforts with governments (97 per cent), the media (95 per cent), social media (93 per cent), other business organizations (92 per cent) and bipartite social dialogue (91 per cent) (see figure 15). Importantly, EBMOs largely considered these efforts to be effective or very effective. The most effective were: engagement with media (89 per cent), engagement with government (85 per cent), social media (85 per cent), partnering with other business organizations (81 per cent) and engagement in bipartite social dialogue (71 per cent).

On the other hand, 20 per cent of EBMOs signaled that their participation in bipartite social dialogue was ineffective and for another 9 per cent, it was not even an option. About 12 per cent of EBMOs reported that discussions with government had little impact.

▶ FIGURE 15.

Effectiveness of EBMO advocacy activities conducted to improve organizational visibility during COVID-19, global results



Box 1: How EBMOs have partnered with other business organizations during COVID-19

- ▶ Supporting national efforts: EBMOs have collaborated with chambers of commerce and sectoral associations to ensure food security and logistics and transport, provide access to health supplies and digital tools, and develop a culture that prevents and contains COVID-19.
- ▶ Developing joint policy advocacy initiatives to support enterprise needs
 - ▶ submitting joint proposals to the government/president/prime minister to request business support measures and provide input into recovery plans
 - ▶ joint media statements
 - ▶ joint enterprise surveys to assess the business impact of COVID-19
 - ▶ establishing a COVID-19 working committee to collectively review the payment of wages during the lockdown period
- ▶ Providing services related to COVID-19 to member enterprises and associations
 - ▶ joint events such as webinars, conferences and meetings on several topics including the reactivation of the economy and human resources management during COVID-19
 - ▶ joint projects on enterprise resilience targeting small and medium-sized enterprises

Source: EBMO survey



My organization is part of the team unit set up under our tripartite arrangement to deal with labour and employment matters. We are directly involved with our chambers of commerce and our business council in advocating the business case and ensuring business is heard and included in the stimulus package spear headed by our government. We have contributed to discussions and ideas on how to help our businesses in areas of agriculture, transportation, port services, banking and finance, superannuation, retail, manufacturing, airline and managing smooth operation of businesses into the new norm. Our organization has put its hand up to be a centre point for information sharing and dissemination of information in terms of our government's state of emergency and lockdown measures. Our businesses have also come forward to provide personal protective equipment to our government front line health workers... our organization has also signed off a tripartite joint communique with the union and government to maintain and ensure industrial harmony and compliance of the COVID-19 protocols and measures in place.

▶ *EBMO survey respondent*



Roundtables with the government, civil society and academia have been effective. Laws have been passed to provide central government subsidies for small and medium-sized enterprises. Additionally, despite the forced closure of most sectors, we were able to advocate for the maintenance of the agro-industrial companies.

▶ *EBMO survey respondent*

Our government has significantly improved the requirements for [employers] to apply for Short-Time Work Allowance (a means to provide employees with income support to be paid from the unemployment fund if and when the working hours in place are decreased)... Now, we need to all say together: Don't lay off your employee, protect your employment, the resource you need is in the Short Time Work Allowance. Our companies that stop or reduce their activities can cover the salaries of their employees for three months. We call on all our companies to use this opportunity.

▶ *EBMO survey respondent, excerpt from joint statement of 29 non-governmental organizations*

The formation of a crisis committee, close collaboration at the national level with all territorial and sectoral partner associations, strong engagement with companies, continuous advocacy efforts as well as resolving conflicts with existing regulations or generating speed in procedures have been effectively achieved by our organization.

▶ *EBMO survey respondent*

In order to address the difficulties caused by the COVID-19 pandemic, we tried to listen and gather members' opinion and voices. Based on such close communication with member companies and a survey on the impact of COVID-19 on the economy and businesses, we delivered business opinions and proposals to address enterprises difficulties and to overcome the economic crisis to the National Assembly and policy makers.

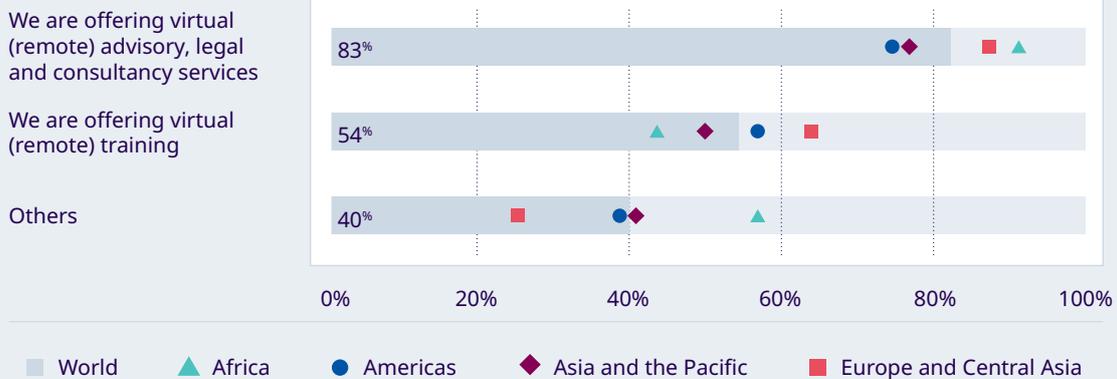
▶ *EBMO survey respondent*

In terms of services, over 80 per cent of EBMOs across the world have renovated and changed their service delivery to adapt to the "new normal". The highest share of EBMOs that transformed their services was in the Americas (97 per cent), followed by the Asia and Pacific (85 per cent), Europe and Central Asia (85 per cent) and Africa (64 per cent).

The majority are now offering virtual advisory, legal and consulting services (83 per cent) whereas more than half have been able to move their training services to an online platform (see figure 16). An additional 40 per cent of EBMOs are offering "other services" such as guidance and resources on COVID-19, virtual conferences and events to members and non-members alike, free of charge webinars as well as services through social media platforms.

▶ FIGURE 16.

Changes in EBMO service delivery as a result of COVID-19, global results by region



▶ We have set up an online COVID-19 Employers' Resource handbook with all information and FAQs connected to legal notices, government schemes, occupational safety and health and public health announcements which members are finding quite useful.

▶ *EBMO survey respondent*

▶ We have launched a weekly OSH advisory which addresses not only the safety aspects of containing the pandemic, but also the employment risk management associated with labour market adjustments.

▶ *EBMO survey respondent*

▶ We are offering advice through social media, including WhatsApp and Telegram.

▶ *EBMO survey respondent*

▶ We are releasing more on social media platforms. We are also offering free webinars as teasers and also offering paid webinars at a token price.

▶ *EBMO survey respondent*

▶ We have launched a hotline to receive enterprise complaints in relation to measures taken by the government. We are also assisting firms and affiliated chambers in organizing distance meetings.

▶ *EBMO survey respondent*

 The implementation of virtual courses and workshops has had a considerable impact even for members who would generally not participate and those with restricted mobility. We have offered members a wide range of online courses, forums, workshops, etc.

▶ *EBMO survey respondent*

 [We have] transitioned the organization to a virtual platform and [we] actively reached out to members to ascertain priorities and concerns. [We have] maintained a regular line of communication, webinars, zoom calls, etc., to continue delivery of the advocacy and services we provide. [We are] highlighting member initiatives for COVID-19 that respond to immediate societal needs.

▶ *EBMO survey respondent*

 24/7 provision of [our organization's] president, officials and advisers to help companies continue operating, manage labour issues, and create bridges with the authorities to resolve problems affecting their operation have proven to be effective during the crisis.

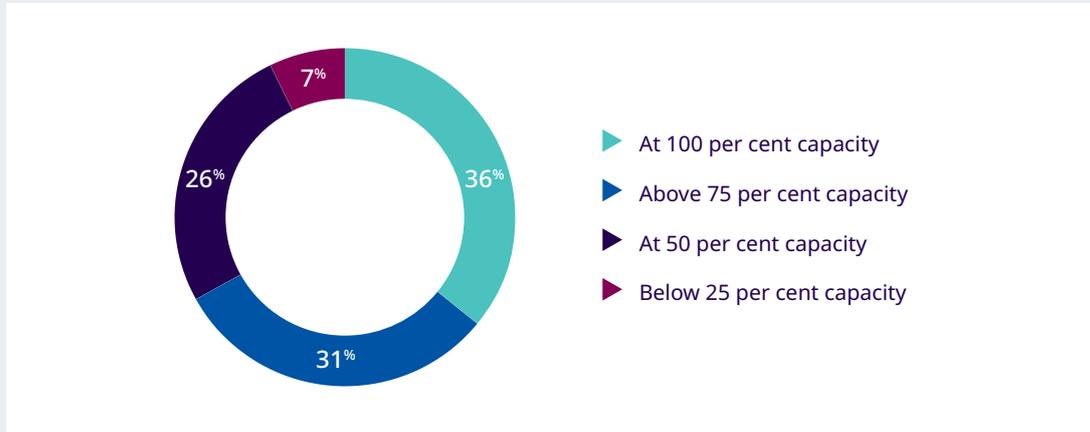
▶ *EBMO survey respondent*

The overall operating capacity has been reduced for nearly 65 per cent of EBMOs surveyed. Government imposed lockdown, border closures and restrictions in movement have inevitably resulted in many EBMOs operating well below normal capacity. 1 in 3 EBMOs note that they are operating at 75 per cent capacity or above, and 1 in 4 EBMOs report their operation has dropped to 50 per cent capacity (see figure 17). Positively, nearly 2 in 5 EBMOs are running in fully capacity. However, breakdown by regions shows a stark imbalance. EBMOs in Africa are experiencing severe limitations with 1 in 3 EBMOs at 50 per cent capacity and even 1 in 7 EBMOs operating at a quarter or less of its normal capacity. In deep contrast, no EBMOs in Europe has reduced its operational capacity to below 25 per cent and over half of EBMOs are working at full capacity.

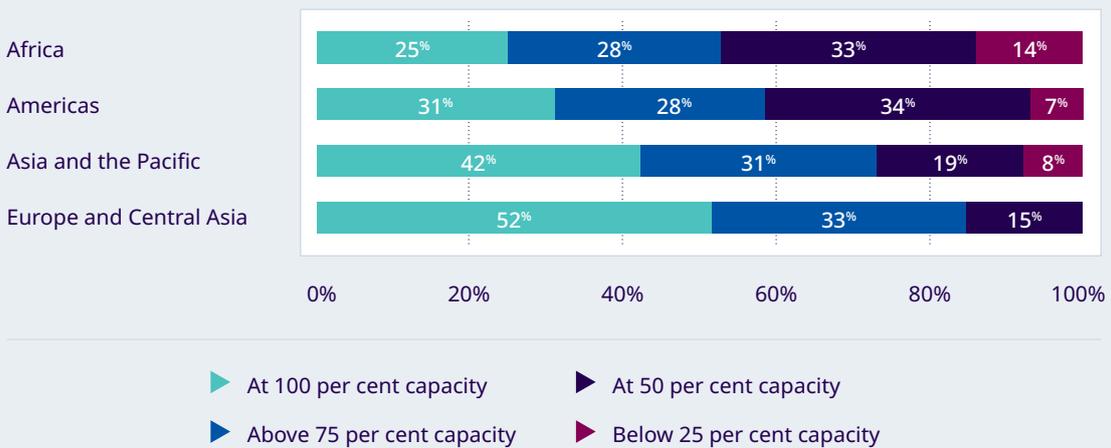
▶ FIGURE 17.

Operating capacity of EBMOs

Panel A. Global results



Panel B. Regional results

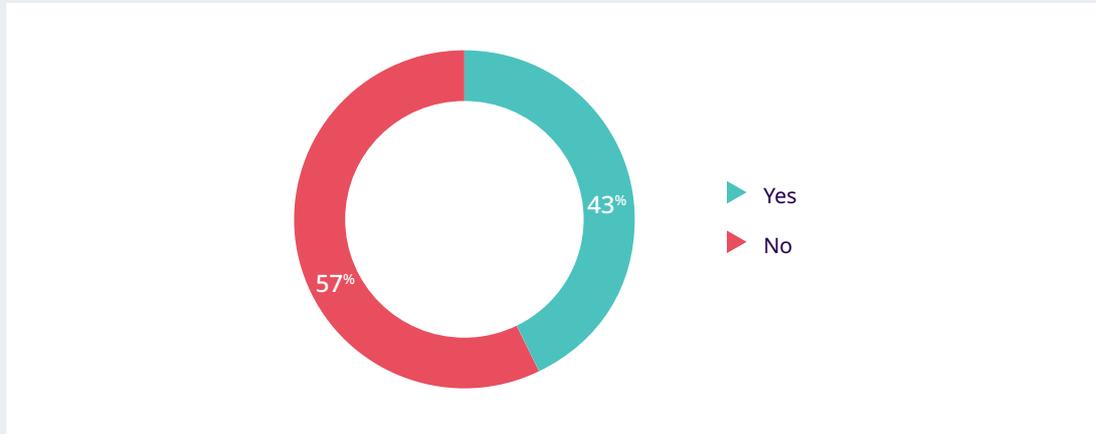


Curbs or interference by governments are also weakening EBMOs ability to operate. Globally, about 43 per cent of EBMOs surveyed reported government restrictions (see figure 18). At the regional level, the highest share of EBMOs citing restrictions was in the Americas (55 per cent), followed by Asia and the Pacific (54 per cent), Africa (39 per cent), and Europe and Central Asia (30 per cent).

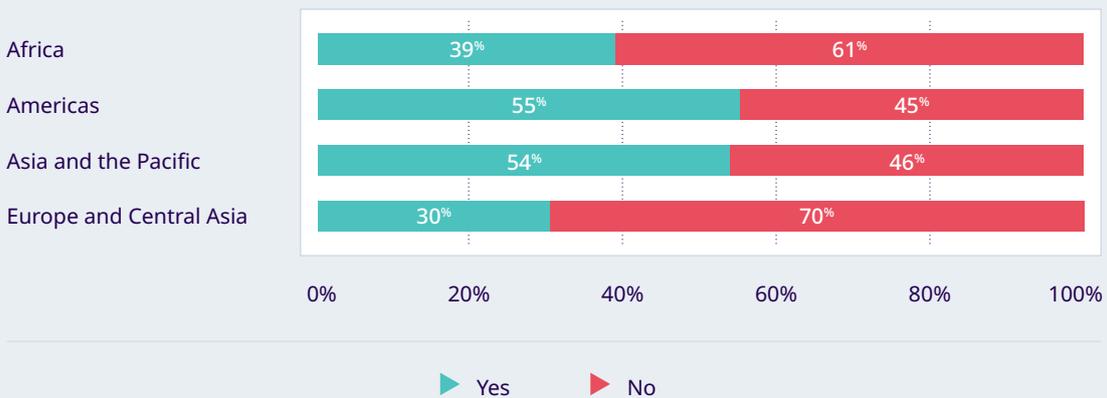
► FIGURE 18.

EBMOs that encountered government restrictions during COVID-19

Panel A. Global results



Panel B. Regional results



Some 47 per cent of surveyed EBMOs highlighted “other restrictions”, including government imposed curfew or lockdowns leading to difficulties in accessing work premises, challenges associated with the ban of mass gatherings and travel, as well as difficulties related to governments lacking a strategic focus or simply being non-functional (see figure 19). Of particular concern, however, is that 40 per cent of the EBMOs indicated suspension of social dialogue institutions, 38 per cent reported the absence of consultation, and 22 per cent said that their freedom had been restricted for reasons other than isolation or lockdown measures. Such restrictions have the potential of further weakening EBMOs, in addition to the negative economic impact of the crisis.

▶ FIGURE 19.

Forms of government restriction encountered by EBMOs during the COVID-19 crisis, global results by region

Other

Government restrictions on or suspension of the operations of social dialogue

Non-consultation by the government on COVID-19 measures

Government restrictions on EDMO freedoms (not related to isolation or lockdowns)



World Africa Americas Asia and the Pacific Europe and Central Asia

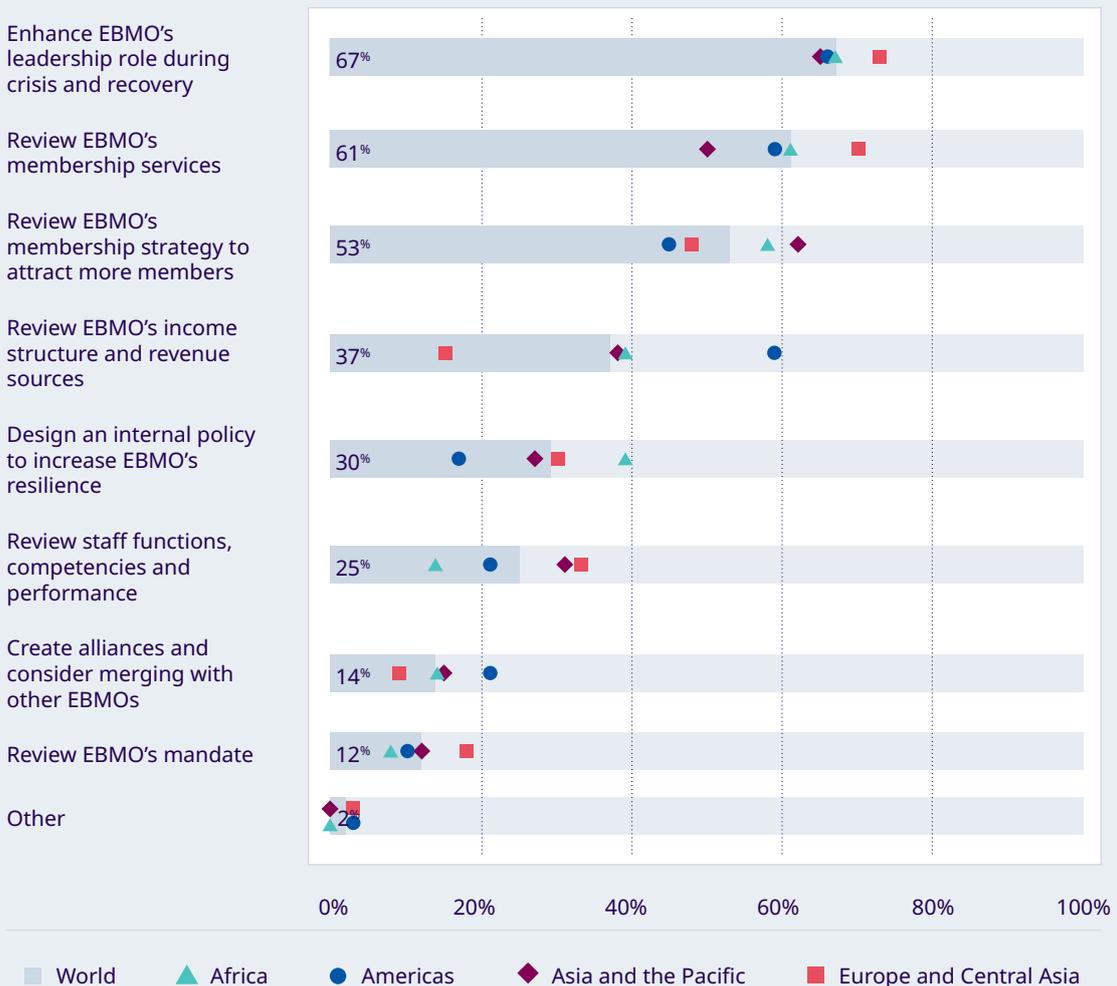
▶ 6. The most pressing needs of EBMOs during the COVID-19 crisis

EBMOs top priority is improving their ability to support enterprises in this crisis. The three most pressing needs of EBMOs include strengthening their ability to shape government support for enterprises (62 per cent), guidance and tools to communicate the role of the private sector in economic and social resilience, growth and prosperity (46 per cent), and information on business continuity (40 per cent). It is clear that the prime concern for EBMOs at this juncture is safeguarding the viability of enterprises. About a third of EBMOs reported that they need guidance on digitalizing services and tools.

EBMOs also predict changes to their business models and internal structure to meet medium and long-term needs stemming from the crisis (see figure 20). These include enhancing their leadership role during crisis and recovery (67 per cent), reviewing their membership services (61 per cent), and reviewing their membership strategy to attract more diverse companies and organizations as members (53 per cent).

▶ FIGURE 20.

Most relevant medium to long-term needs for change in EBMO business models and internal structure, global results by region



▶ 7. How the ILO-ACT/EMP and IOE could support EBMOs during COVID-19

Overall, EBMOs highlighted that assistance already provided by the ILO-ACT/EMP and the IOE during the COVID-19 crisis was important and useful.

Surveyed EBMOs reported that key areas where the IOE could lend support included information sharing, influencing global and local policy, delivering knowledge products, and lobbying and advocating for the private sector. More specifically:

- ▶ 51 per cent of EBMOs indicated that they required assistance from the IOE in terms of sharing information, knowledge and good practices. Some EBMOs specifically indicated that they would like to learn about economic recovery processes, crisis management, and public-private strategies for recovery in a post-COVID-19 context, among others.
- ▶ About 58 per cent of EBMOs highlighted that they would like the IOE to keep influencing global and local policy. Some EBMOs highlighted that such an influence was necessary in order to better support the private sector. One EBMO specifically asked for “lobbying activities that can help better position the EBMO in relation to the government and greater involvement of the EBMO in the process of creating policies, measures and decisions that are important to the business community”.
- ▶ A quarter of EBMOs sought the IOE’s assistance for communication support. One EBMO indicated that “there [was] an urgent need to develop an online platform for communicating with members and the business community.”

EBMOs also reported that the support of the ILO-ACT/EMP was needed in training and institutional capacity development, information sharing, provision of knowledge products and/or tools, and technical and/or financial assistance, among others. More specifically,

- ▶ 60 per cent of EBMOs highlighted the need to receive training in order to further develop their institutional capacity. Some of the EBMOs mentioned the following areas of focus: future of work, digital transformation tools, organization of remote work, occupational safety and health in the COVID-19 context, innovative member services and crisis management, among others.
- ▶ A third of EBMOs asked for knowledge products and/or tools. One EBMO mentioned “tools and knowledge products are most needed for both immediate and long-term needs, concerning the changing environment.”
- ▶ About 15 per cent of EBMOs asked for technical assistance from the ILO-ACT/EMP. Some observations from selected EBMOs include:
 - ▶ “In the medium term with the economic crisis looming on the horizon, our EBMO needs technical assistance for a study with a view to develop proposals for economic recovery.”
 - ▶ “[We need] assistance in articulating some economic initiatives that can positively impact the business environment.”
 - ▶ “The ILO-ACT/EMP can help in capacity building of [our] EBMO by providing technical support for starting digital training programmes related to industrial relations and human resources which can become a continuous source of income for the EBMO.”

▶ 8. Conclusions

The COVID-19 pandemic is dramatically changing the global economic landscape and having a significant impact on EBMOs worldwide. The survey results show that most EBMOs have been quick to feel the impact of the crisis, which has forced them to adjust their operations and services. EBMOs anticipate changes in membership in the short-term and medium to long-term, as a sizeable proportion of their members is likely to become insolvent or struggle to stay afloat. A large majority of those surveyed further report a drop in income and, consequentially, they are taking on cost-cutting measures to counter the loss.

Despite these difficult circumstances, the survey demonstrates that EBMOs are not in a state of paralysis. On the contrary, they are taking the initiative in pulling together all the various parts of the private sector and are proactively leading business in the response to the crisis and the recovery efforts. As highlighted in the ILO-ACT/EMP and IOE report on “Changing business and opportunities for employer and business organizations”, EBMOs are helping to build more collaborative economies in which governments and enterprises come together to tackle major challenges.⁷ The accelerated pace of change brought by the COVID-19 pandemic is further demanding EBMOs to adopt a long-term vision based on strategic foresight.

The survey reveals that EBMOs are agile and responsive to membership needs and are swiftly adapting their services and guidance to address the specific challenges of COVID-19. In addition, EBMOs are making efforts to increase their public visibility in the crisis by intensifying their outreach to members through various communication channels and by partnering with other business organizations to provide joint solutions. The magnitude of advocacy efforts by EBMOs towards the government and relevant stakeholders are evidence of the fundamental role that EBMOs continue to play as institutions that on the one hand put forward policy choices accurately reflecting the needs of business, and on the other seek to accommodate the wider expectations of society.

Finally, the survey findings underscores the importance of international cooperation and having a platform where EBMOs can share experience and learn from each other. Global networks have a critical role in facilitating peer-to-peer learning, supporting cooperation and amplifying messages of EBMOs at international levels. The digitalization of meetings have enabled EBMOs globally to participate in international policy discussions and workshops with one click and strengthened the ties between EBMOs and their global and regional membership organizations.

Points for consideration by EBMOs

Given the uncertainty and volatility of the pandemic, it is important for EBMOs to continuously stay abreast of new developments, sharpen their risk assessment methods, assess emerging scenarios, engage in all relevant processes to improve enterprise resilience, and make necessary organizational adaptations. EBMOs should consider the following action:

Secure organizational sustainability during the crisis and recovery

- ▶ Safeguard membership and representational strength: EBMOs should keep under constant review changes to their membership and pursue a membership retention strategy during the crisis and recovery period. This strategy should accommodate the situation of members unable to meet dues or other requirements, and at the same time provide incentives that increase the value of membership.
- ▶ Maintain competence and operational capability: when having to take cost-cutting measures, EBMOs should give preference to those measures that least affect the EBMOs' competence and its ability to act.
- ▶ Manage liquidity: EBMOs should review income streams and lines of credit, and take action to mitigate a shortfall in revenue.

⁷ ILO and IOE, *Changing business and opportunities for employer and business organization* (Geneva, 2019).

Be visible as the voice of business

- ▶ Demonstrate evidence-based and constructive leadership: galvanize the business voice to effectively contribute to government policy responses to the crisis; organize private sector assistance to support national crisis efforts; and capitalize on scaled up policy dialogue with government and workers' organizations to enhance organizational relevance.
- ▶ Respond to the needs of members and potential members: address the specific needs of enterprises in the crisis; do not miss the opportunity to reach out to new members to diversify membership.

Anticipate business impact and future trends

- ▶ Rebuild through innovative approaches: innovate and digitalize EBMO service delivery and consider partnerships with other business organizations and like-minded stakeholders.
- ▶ Develop an EBMO risk management programme: assess emerging risks and global trends that may have an impact on the organization and its members, raise awareness among members of potential threats, and build financial buffers.
- ▶ Improve organizational crisis resilience: establish strategies for income sustainability and organizational resilience, for instance build financial reserves, as far as possible, and have contingency plans in place.

Points for consideration by governments

Many governments have launched unprecedented fiscal and monetary packages to counter the economic and social impact of COVID-19, sometimes along with commitments “to do whatever it takes” to protect their people. However, governments cannot overcome the challenges presented by COVID-19 on their own. It is important for them to coordinate and work together with labour market institutions, including EBMOs, to deal with the immediate health crisis, mitigate the effects of restrictive measures taken and rebuild businesses, the economy and the society.

While the survey did not collect the views of governments, responding EBMOs demonstrate the need for governments to work hand-in-hand with them to preserve a vibrant private sector and serve the wider society. In particular, governments should consider the following:

- ▶ respect the autonomy and mandate of EBMOs, in line with freedom of association principles, and maintain functioning social dialogue processes in the crisis.
- ▶ consult EBMOs on government measures responding to the crisis, especially as they relate to enterprises, the workplace and the workforce.
- ▶ extend support to EBMOs, where necessary, so as to ensure that EBMOs can play their role as key labour market institutions in the crisis.

Conclusions

Overall, EBMOs are showing a strong crisis response capability to minimize the associated negative impacts of COVID-19 and to ensure the continued delivery of their mandate based on a sound business voice. EBMOs, together with governments, workers' organizations and other stakeholders, are well positioned to reduce risks, minimize the impact of future shocks, and do “whatever it takes” to put people, planet and prosperity back on a trajectory towards sustainable development.

▶ Annex 1. Regional snapshots of key survey results

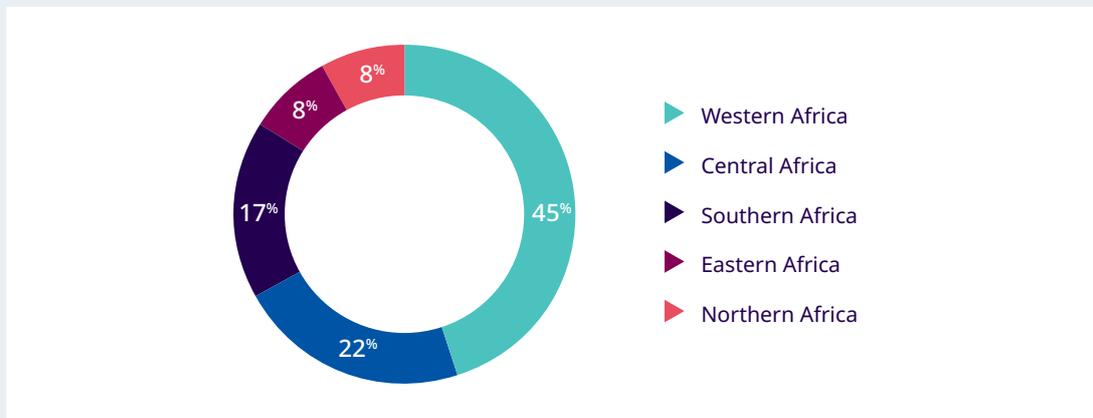
Africa

I. Profile of surveyed EBMOs

▶ A total 36 EBMOs in Africa answered the survey.

▶ FIGURE A21.

Distribution of surveyed EBMOs

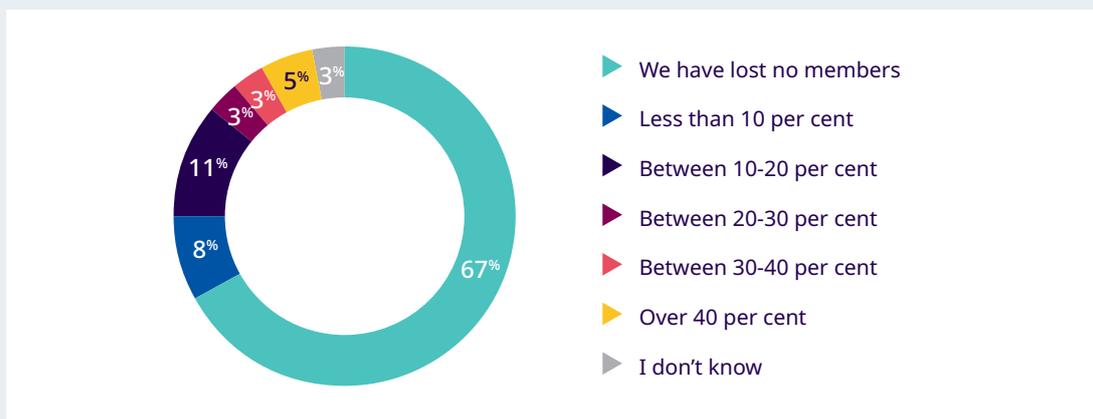


II. COVID-19's impact on EBMO membership

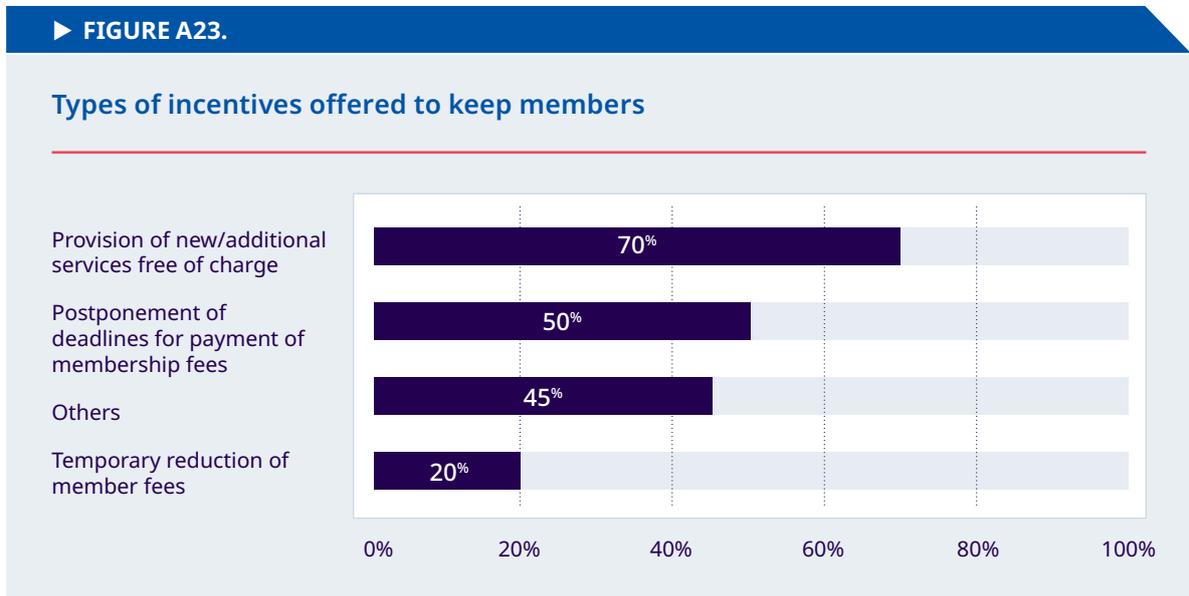
▶ As of May 2020, 67 per cent of EBMOs reported not losing members due to COVID-19.

▶ FIGURE A22.

Membership termination as a result of COVID-19



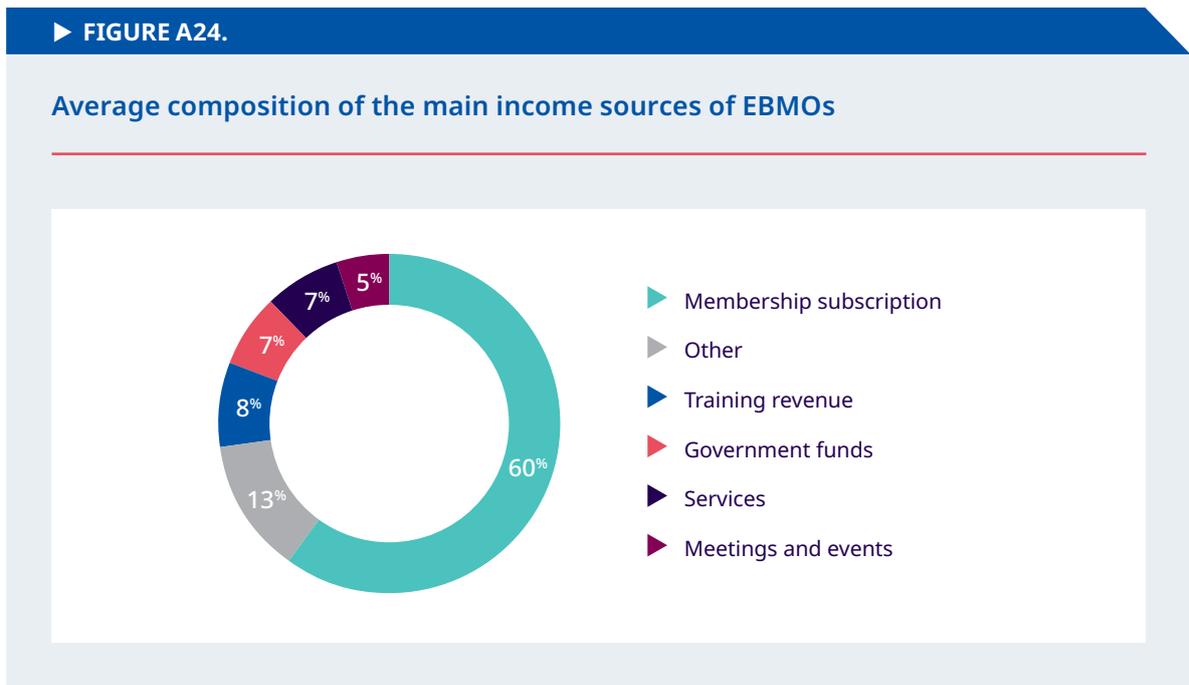
- ▶ Fifty-six per cent of EBMOs offered incentives to retain members.
- ▶ Among EBMOs that offered incentives, 70 per cent provided new or additional services free of charge and 50 per cent postponed deadlines for payment of membership fees.



- ▶ Of surveyed EBMOs, 75 per cent reported that incentives were partially effective and 25 per cent reported that incentives were effective.

III. COVID-19's impact on EBMO income

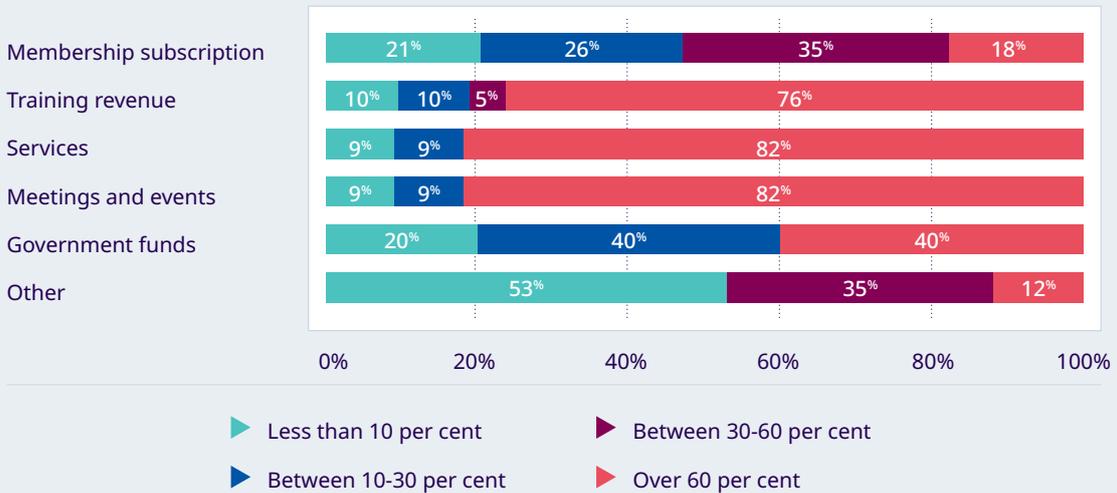
- ▶ EBMOs reported that 60 per cent of their income prior to COVID-19 came from membership subscription and 8 per cent from training revenue.



- ▶ Ninety-seven per cent of EBMOs reported income declines resulting from the COVID-19 crisis.
- ▶ During March-April 2020, 4 in 5 EBMOs experienced income declines by more than 60 per cent from training revenue, services and meetings and events.

▶ **FIGURE A25.**

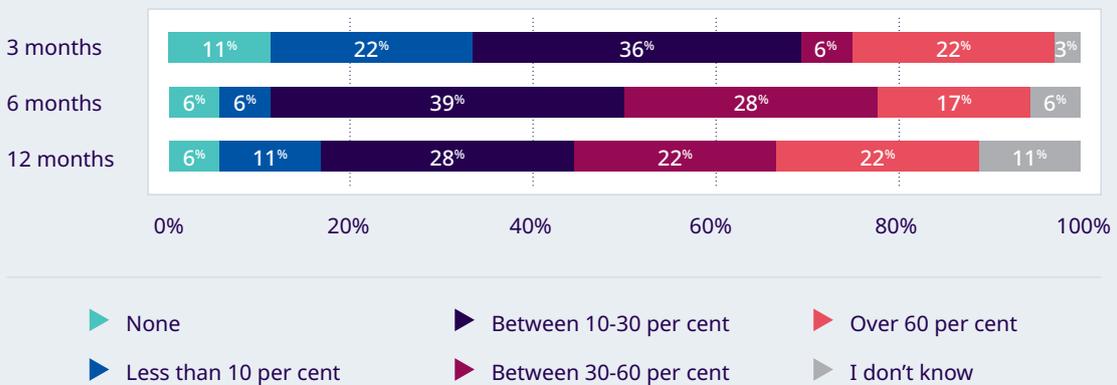
Extent of EBMO income decline as a result of COVID-19



- ▶ In the short-term (three months), 36 per cent of EBMOs surveyed in Africa reported that they expected a decrease in income by 10 to 30 per cent, and 22 per cent of EBMOs cited a possible income drop of more than 60 per cent.
- ▶ In the medium-term (six months), 39 per cent of EBMOs highlighted a possible income decline of 10 to 30 per cent, and 28 per cent of EBMOs cited potential loss of 30 to 60 per cent.
- ▶ In the long-term (one year), 28 per cent of EBMOs expected an income decline of 10 to 30 per cent, and an equal share of 22 per cent of EBMOs indicated that their income would drop by 30 to 60 per cent or by more than 60 per cent.

▶ **FIGURE A26.**

Expected decrease in EBMO income in the next 3, 6 and 12 months



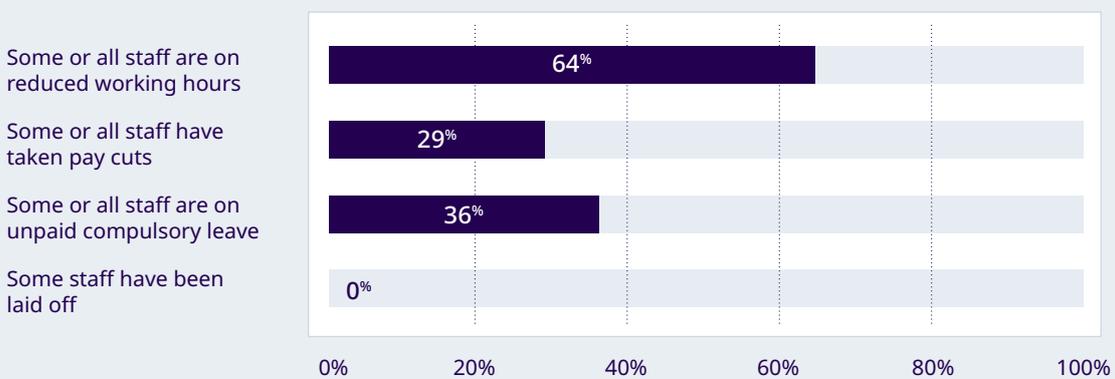
- ▶ Of surveyed EBMOs, 75 per cent reduced travel costs, 47 per cent reduced external collaboration costs and 39 per cent reduced staff costs.
- ▶ Only 25 per cent of EBMOs had financial reserves or access to alternative sources to manage the impact of COVID-19.

IV. COVID-19's impact on EBMO workforce

- ▶ Of EBMOs that reduced staff costs in Africa, 64 per cent reduced working hours of some or all staff, 36 per cent had staff on unpaid compulsory leave and 29 per cent reduced staff wages.

▶ **FIGURE A27.**

Implemented cost-cutting measures to respond to income reduction



- ▶ 1 in 10 EBMOs expect to reduce their workforce in the next 3 months and 3 in 10 EBMOs anticipated downsizing staff in the next 6-12 months.

V. COVID-19's impact on EBMO advocacy activities and services

- ▶ All surveyed EBMOs in Africa increased advocacy initiatives to improve visibility during the COVID-19 crisis.
- ▶ Of surveyed EBMOs, 89 per cent engaged more actively with the government, 83 per cent engaged more actively with the media to advocate for enterprise needs, 72 per cent engaged more actively in social media or engaged more actively in bipartite social dialogue, and 61 per cent partnered more actively with other business organizations.

▶ **FIGURE A28.**

Effectiveness of advocacy initiatives conducted to improve organizational visibility during COVID-19



- ▶ Sixty-four per cent of EBMOs changed their service delivery due to restrictions of movement imposed by authorities such as lockdown.
- ▶ Of EBMOs that changed service delivery, 91 per cent offered online advisory, legal and consulting services; 57 per cent offered other services including webinars and video conferences and 43 per cent offered online trainings.

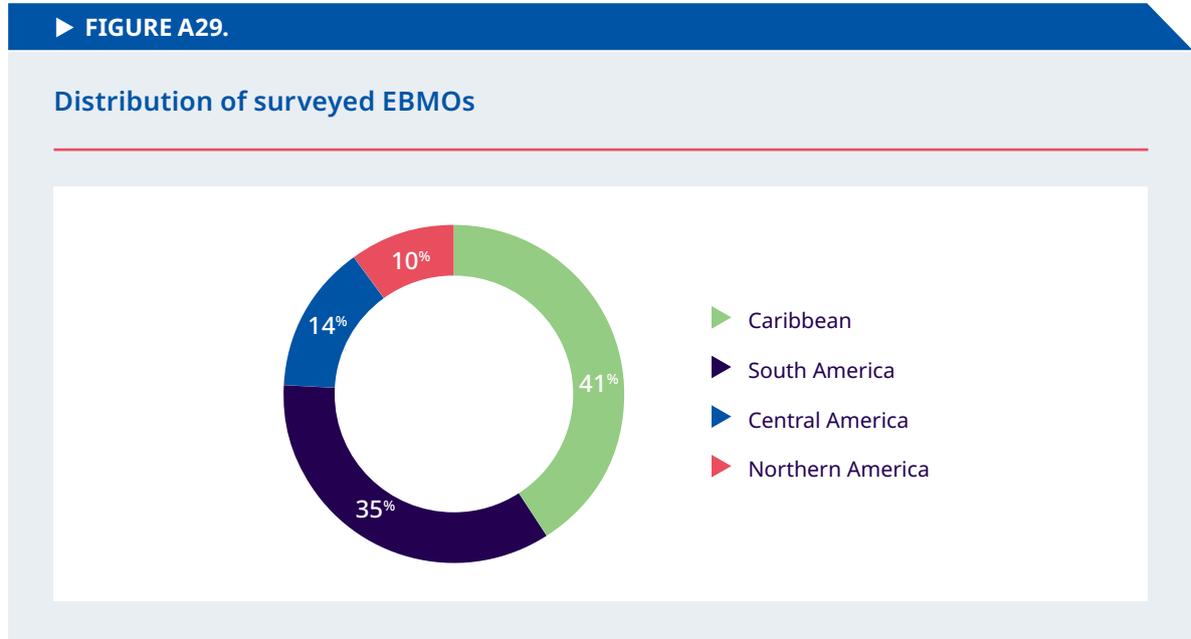
VI. Impact of COVID-19 on EBMO capacity and needs

- ▶ Of surveyed EBMOs, 25 per cent reported operating at full capacity, 28 per cent operated at three-quarters capacity, 33 per cent operated at half capacity, and 14 per cent operated below a quarter capacity.
- ▶ The three most important areas where EBMOs needed support to better serve their members during the COVID-19 crisis were:
 - ▶ Enhanced representation for government support and responsive measures for enterprises (56 per cent);
 - ▶ Guidance/communication tools and policies on the value and role of the private sector in economic and social resilience, growth and prosperity (44 per cent);
 - ▶ Information on business continuity (42 per cent).
- ▶ The three most relevant medium to long-term needs for change in EBMO business models and internal structure were:
 - ▶ Enhance EBMO leadership role during crisis and recovery (67 per cent);
 - ▶ Review EBMO membership services (61 per cent);
 - ▶ Review EBMO membership strategy to attract more members (58 per cent).

Americas

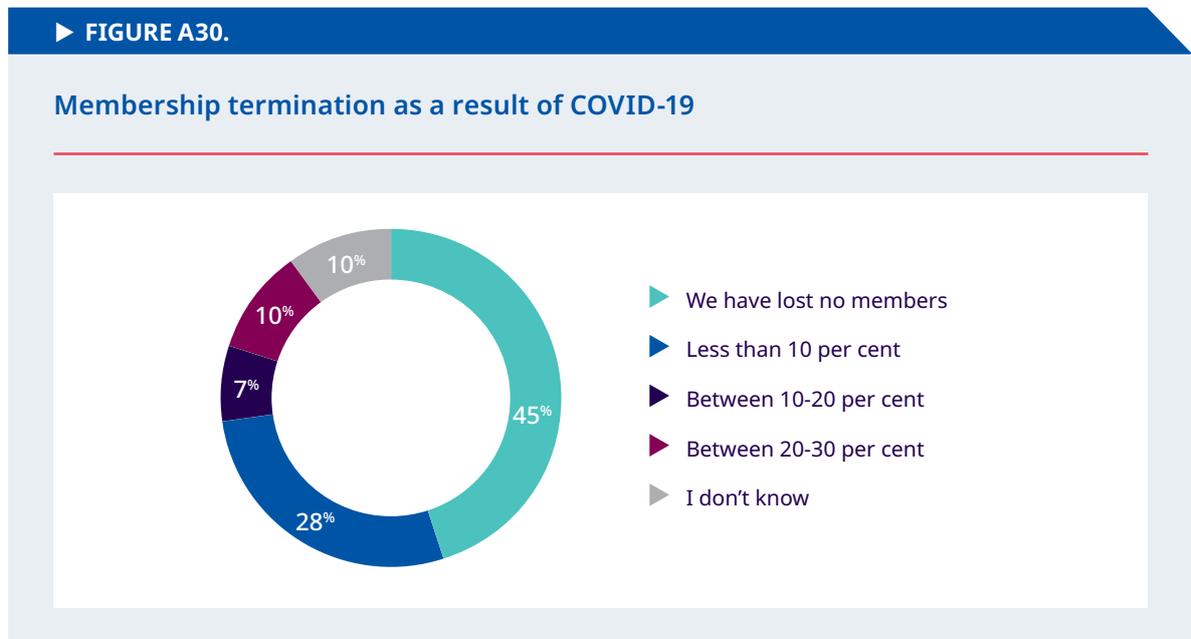
I. Profile of surveyed EBMOs

▶ A total 29 EBMOs in the Americas answered the survey.



II. COVID-19's impact on EBMO membership

▶ As of May 2020, 45 per cent of EBMOs reported not losing members due to COVID-19.



- ▶ Sixty-two per cent of EBMOs offered incentives to retain members.
- ▶ Among EBMOs that offered incentives, 78 per cent postponed deadlines for payment of membership fees and 50 per cent provided new or additional services free of charge, or temporarily reduced member fees.

▶ **FIGURE A31.**

Types of incentives offered to keep members



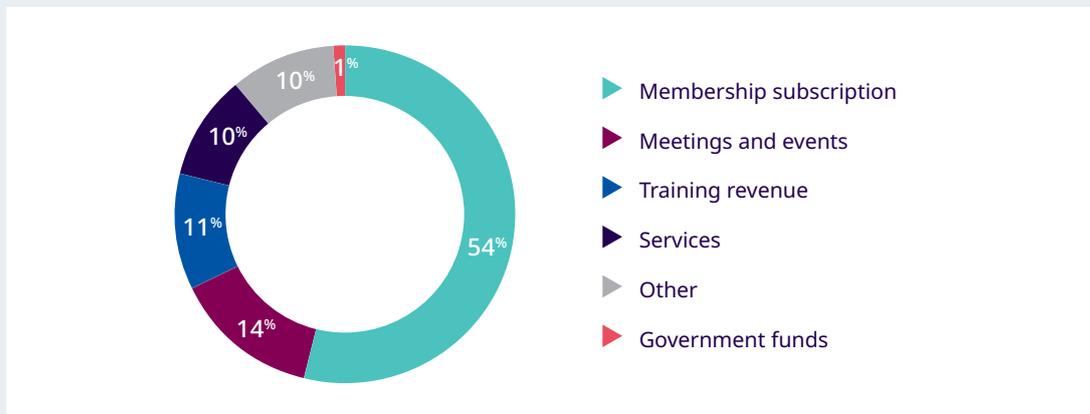
- ▶ Of surveyed EBMOs, 56 per cent reported that incentives were effective, 39 per cent reported that incentives were partially effective, and 6 per cent reported that incentives were ineffective.

III. COVID-19's impact on EBMO income

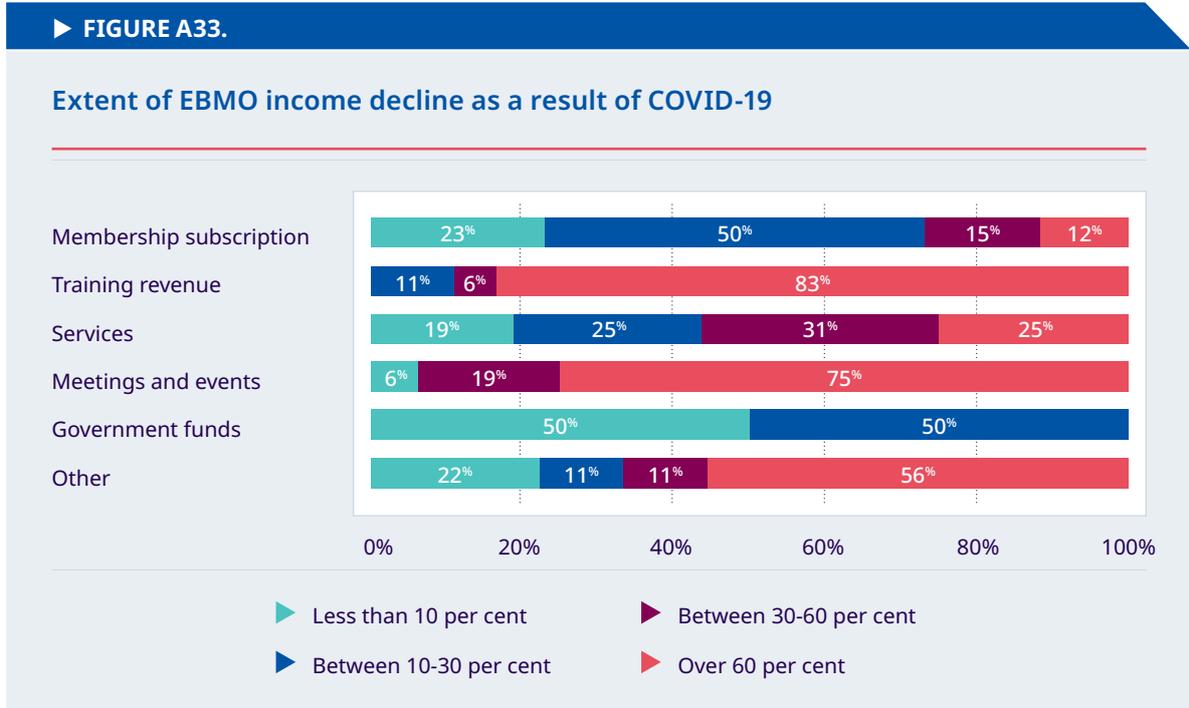
- ▶ EBMOs reported that 54 per cent of their income prior to COVID-19 came from membership subscription and 14 per cent from meetings and events.

▶ **FIGURE A32.**

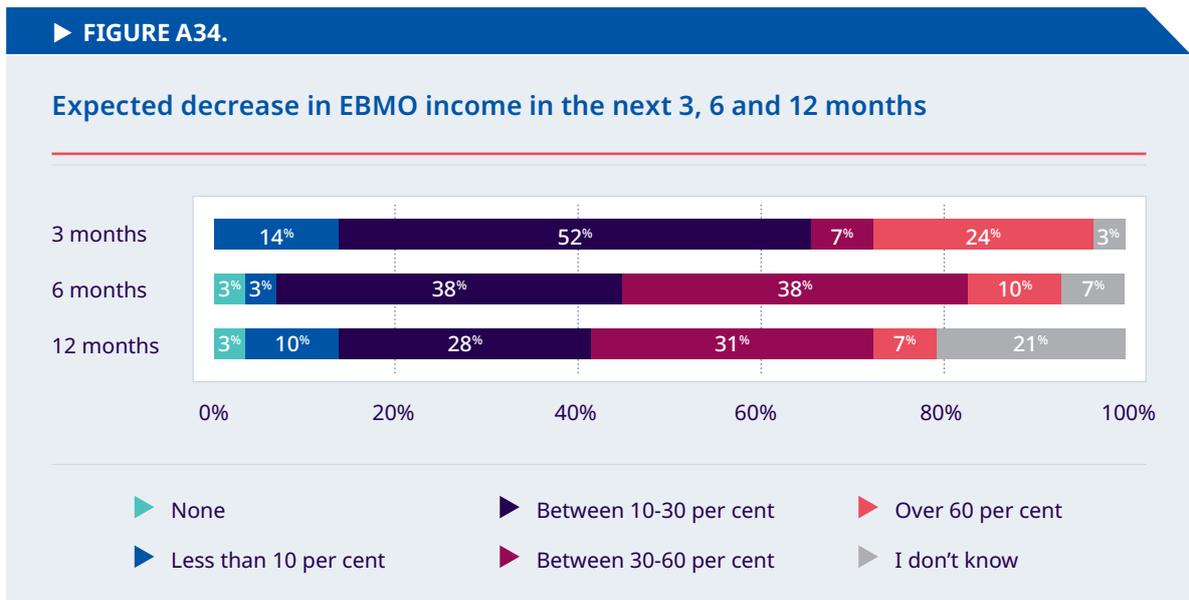
Average composition of the main income sources of EBMOs



- ▶ Ninety-three per cent of EBMOs reported income declines resulting from the COVID-19 crisis.
- ▶ During March-April 2020, 83 per cent of EBMOs experienced income declines by more than 60 per cent from training revenue, and meetings and events.



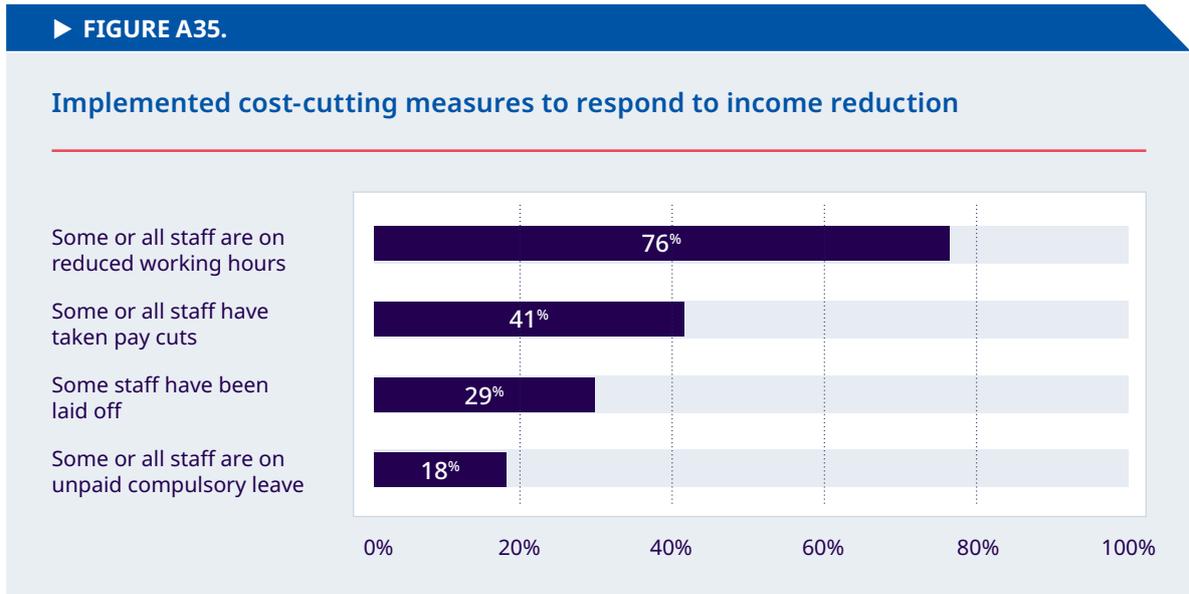
- ▶ In the short-term (three months), 52 per cent of EBMOs surveyed in the Americas reported that they expected a decrease in income by 10 to 30 per cent, and 24 per cent of EBMOs cited a possible income drop more than 60 per cent.
- ▶ In the medium-term (six months), an equal share of 38 per cent of EBMOs highlighted possible income decline of 10 to 30 per cent or 30 to 60 per cent.
- ▶ In the long-term (one year), 31 per cent of EBMOs expected an income decline of 30 to 60 per cent, and 28 per cent of EBMOs indicated that their income would drop by 10 to 30 per cent.



- ▶ Of surveyed EBMOs, 72 per cent reduced travel costs, 59 per cent reduced staff costs and 45 per cent office space costs.
- ▶ Only 38 per cent of EBMOs had financial reserves or access to alternative sources to manage the impact of COVID-19.

IV. COVID-19’s impact on EBMO workforce

- ▶ Of EBMOs in the Americas that reduced staff costs, 76 per cent reduced working hours of some or all staff, 41 per cent reduced staff wages, 29 per cent laid off staff and 18 per cent had staff on unpaid compulsory leave.



- ▶ 6 in 10 EBMOs expect to reduce their workforce in the next three months to one year.

V. COVID-19’s impact on EBMO advocacy activities and services

- ▶ Nine out of ten EBMOs in the Americas increased advocacy initiatives to improve visibility during the COVID-19 crisis.
- ▶ Of EBMOs that increase advocacy initiatives, 100 per cent engaged more actively in social media, 96 per cent engaged more actively with the media to advocate for enterprise needs, an equal share of 92 per cent engaged more actively with the government or partnered more actively with other business organizations, and 88 per cent engaged more actively in bipartite social dialogue.

▶ **FIGURE A36.**

Effectiveness of advocacy initiatives conducted to improve organizational visibility during COVID-19



- ▶ Ninety-seven per cent of EBMOs changed their service delivery due to restrictions of movement imposed by authorities such as lockdown.
- ▶ Of EBMOs that changed service delivery, 75 per cent offered online advisory, legal and consulting services; 57 per cent offered online trainings; and 39 per cent offered other services including webinars and video conferences.

VI. Impact of COVID-19 on EBMO capacity and needs

- ▶ Of surveyed EBMOs, 31 per cent reported operating at full capacity, 28 per cent operated at three-quarters capacity, 34 per cent operated at half capacity, and 7 per cent operated below a quarter capacity.
- ▶ The four most important areas where EBMOs needed support to better serve their members during the COVID-19 crisis were:
 - ▶ Enhanced representation for government support and responsive measures for enterprises (66 per cent);
 - ▶ Guidance/communication tools and policies on the value and role of the private sector in economic and social resilience, growth and prosperity (66 per cent);
 - ▶ Information on business continuity (41 per cent);
 - ▶ Guidance on digital services for members (41 per cent).
- ▶ The three most relevant medium to long-term needs for change in EBMO business models and internal structure were:
 - ▶ Enhance EBMO leadership role during crisis and recovery (66 per cent);
 - ▶ Review EBMO membership services (59 per cent);
 - ▶ Review EBMO income structure and revenue sources (59 per cent).

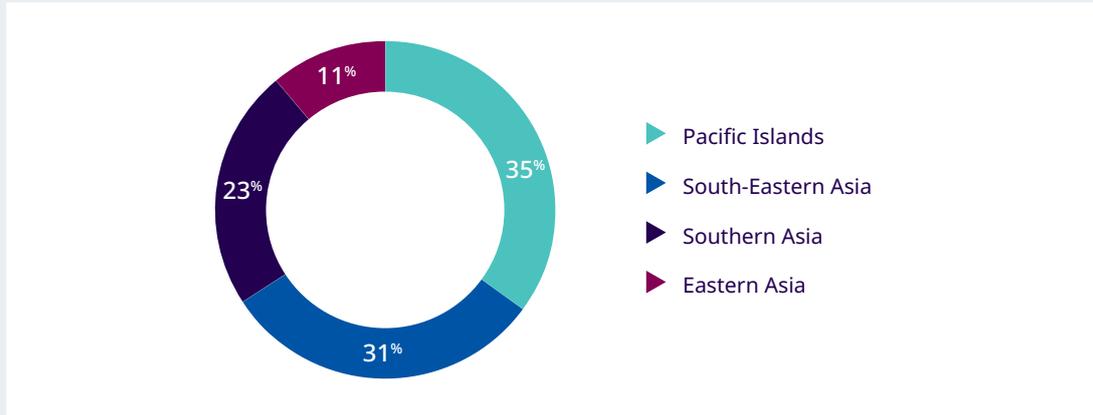
Asia and the Pacific

I. Profile of surveyed EBMOs

- ▶ A total 26 EBMOs in Asia and the Pacific answered the survey.

▶ FIGURE A37.

Distribution of surveyed EBMOs

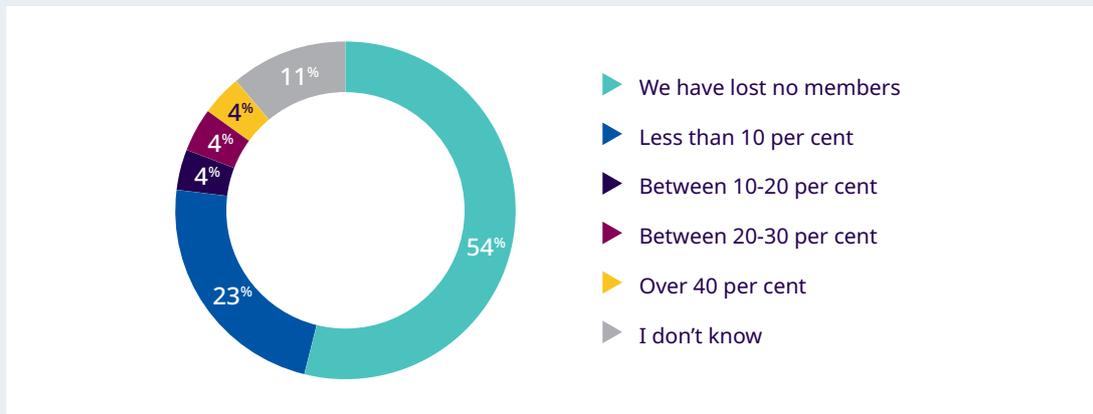


II. COVID-19's impact on EBMO membership

- ▶ As of May 2020, 54 per cent of EBMOs reported not losing members due to COVID-19.

▶ FIGURE A38.

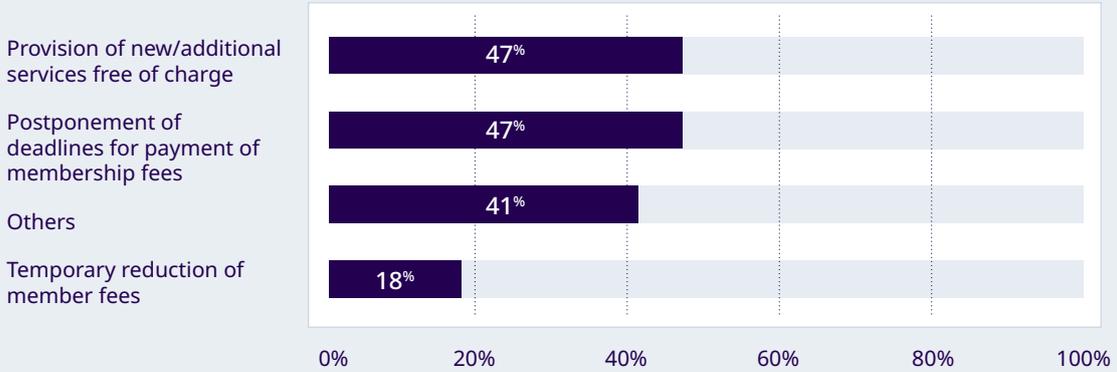
Membership termination as a result of COVID-19



- ▶ Sixty-five per cent of EBMOs offered incentives to retain members.
- ▶ Among EBMOs that offered incentives, an equal share of 47 per cent provided new or additional services free of charge or postponed deadlines for payment of membership fees.

► FIGURE A39.

Types of incentives offered to keep members



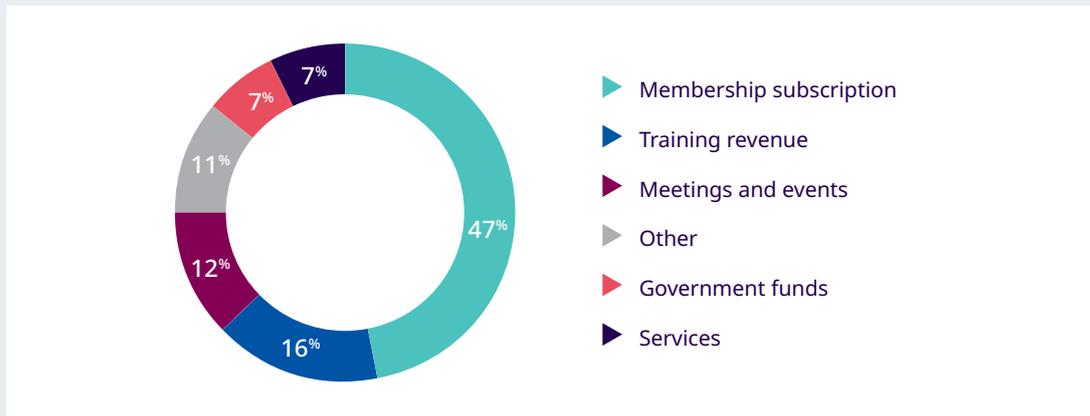
- Of surveyed EBMOs, 53 per cent reported that incentives were effective and 47 per cent reported that incentives were partially effective.

III. COVID-19's impact on EBMO income

- EBMOs reported that 47 per cent of their income prior to COVID-19 came from membership subscription, 16 per cent from training revenue and 12 per cent from meetings and events.

► FIGURE A40.

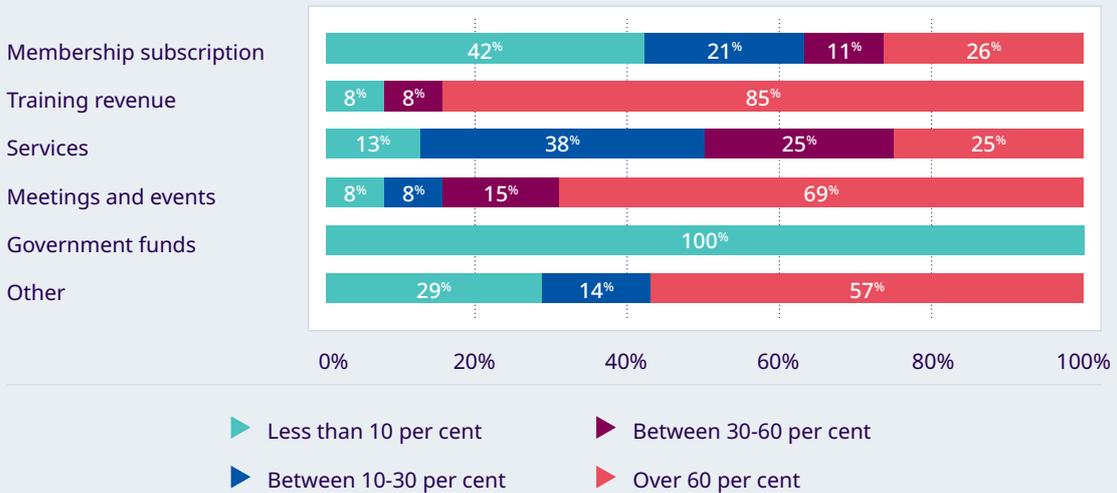
Average composition of the main income sources of EBMOs



- Seventy-three per cent of EBMOs reported income declines resulting from the COVID-19 crisis.
- During March-April 2020, 85 per cent EBMOs experienced income declines by more than 60 per cent from training revenue; and 69 per cent of EBMOs reported income declines by more than 60 per cent from meetings and events.

▶ **FIGURE A41.**

Extent of EBMO income decline as a result of COVID-19



- ▶ In the short-term (three months), 31 per cent of EBMOs surveyed in Asia and the Pacific reported that they expected a decrease in income under 10 per cent, and 23 per cent of EBMOs cited a possible income drop of over 60 per cent.
- ▶ In the medium-term (six months), 23 per cent of EBMOs highlighted possible income decline of 10 to 30 per cent, and 19 per cent of EBMOs cited potential loss of 30 to 60 per cent.
- ▶ In the long-term (one year), 23 per cent of EBMOs expected an income decline of 10 to 30 per cent, and 15 per cent of EBMOs reported that their income would decrease over 60 per cent.

▶ **FIGURE A42.**

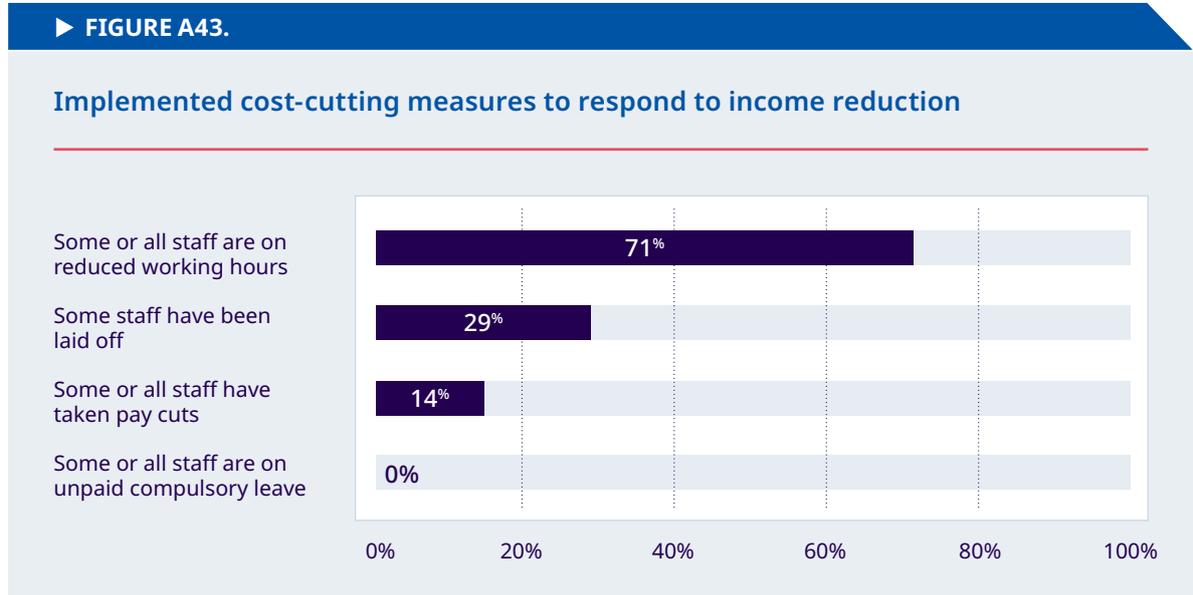
Expected decrease in EBMO income in the next 3, 6 and 12 months



- ▶ Of surveyed EBMOs, 81 per cent reduced travel costs, 27 per cent reduced staff costs and 27 per cent reduced external collaboration costs.
- ▶ Half of surveyed EBMOs had financial reserves or access to alternative sources to manage the impact of COVID-19.

IV. COVID-19’s impact on EBMO workforce

- ▶ Of EBMOs that reduced staff costs, 71 per cent reduced working hours of some or all staff, 29 per cent laid off staff and 14 per cent reduced staff wages.



- ▶ One in ten EBMOs expect to reduce their workforce in the next three months, 2 in 10 EBMOs anticipate downsizing their headcount in next six months, and a growing 3 in 10 EBMOs predict a shrinking workforce in next 12 months.

V. COVID-19’s impact on EBMO advocacy activities and services

- ▶ Ninety-six per cent of EBMOs in Asia and the Pacific increased advocacy initiatives to improve visibility during the COVID-19 crisis.
- ▶ Of surveyed EBMOs, 100 per cent engaged more actively with the government or partnered more actively with other business organizations, 96 per cent engaged more actively with the media to advocate for enterprise needs and engaged more actively in social media, and 88 per cent engaged more actively in bipartite social dialogue.

▶ **FIGURE A44.**

Effectiveness of advocacy initiatives conducted to improve organizational visibility during COVID-19



- ▶ Eighty-five per cent of EBMOs changed their service delivery due to restrictions of movement imposed by authorities such as lockdown.
- ▶ Of EBMOs that changed service delivery, 77 per cent offered online advisory, legal and consulting services; 50 per cent offered online trainings; and 41 per cent offered other services including webinars and video conferences.

VI. Impact of COVID-19 on EBMO capacity and needs

- ▶ Of surveyed EBMOs, 42 per cent reported operating at full capacity, 31 per cent operated at three-quarters capacity, 19 per cent operated at half capacity, and 8 per cent operated below a quarter capacity.
- ▶ The three most important areas where EBMOs needed support to better serve their members during the COVID-19 crisis were:
 - ▶ Enhanced representation for government support and responsive measures for enterprises (69 per cent);
 - ▶ Information on business continuity (46 per cent).
 - ▶ Guidance on government measures made available for enterprises (46 per cent);
- ▶ The three most relevant medium to long-term needs for change in EBMO business models and internal structure were:
 - ▶ Enhance EBMO leadership role during crisis and recovery (65 per cent);
 - ▶ Review EBMO membership strategy to attract more members (62 per cent);
 - ▶ Review EBMO membership services (50 per cent).

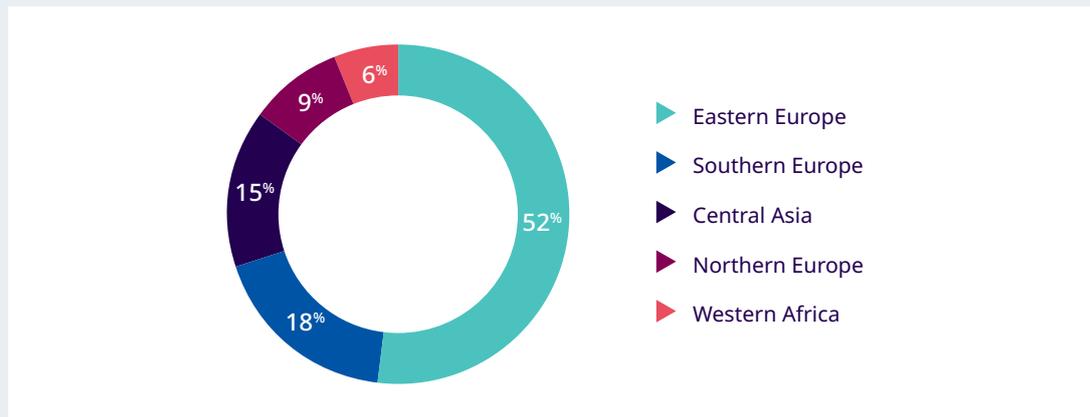
Europe and Central Asia

I. Profile of surveyed EBMOs

- ▶ A total 33 EBMOs in Europe and Central Asia answered the survey.

▶ FIGURE A45.

Distribution of surveyed EBMOs

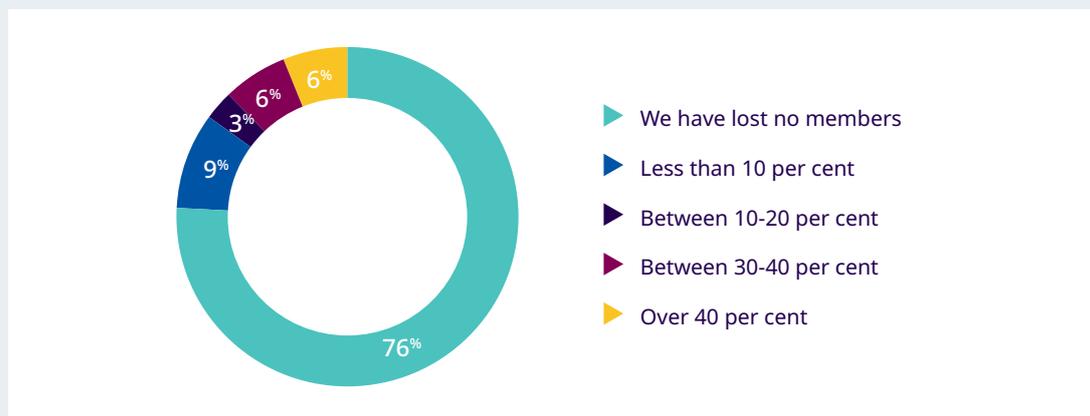


II. COVID-19's impact on EBMO membership

- ▶ As of May 2020, 76 per cent of EBMOs reported not losing members due to COVID-19.

▶ FIGURE A46.

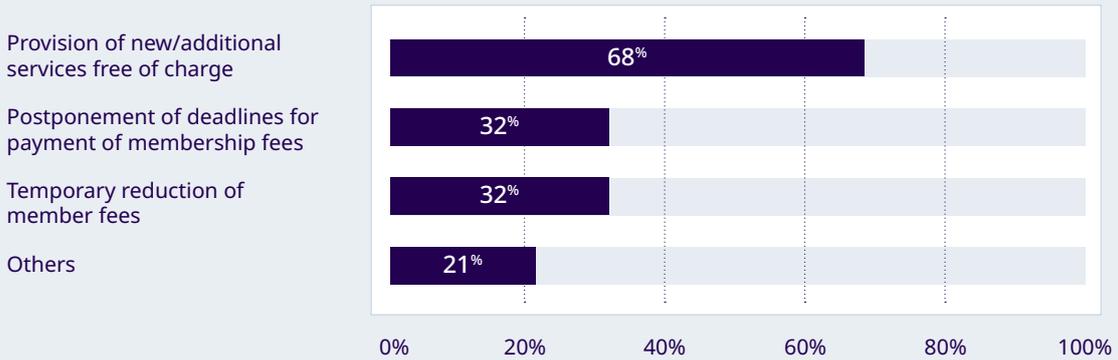
Membership termination as a result of COVID-19



- ▶ Fifty-eight per cent of EBMOs offered incentives to retain members.
- ▶ Among EBMOs that offered incentives, 68 per cent provided new or additional services free of charge and 32 per cent postponed deadlines for payment of membership fees or temporarily reduced member fees.

▶ **FIGURE A47.**

Types of incentives offered to keep members



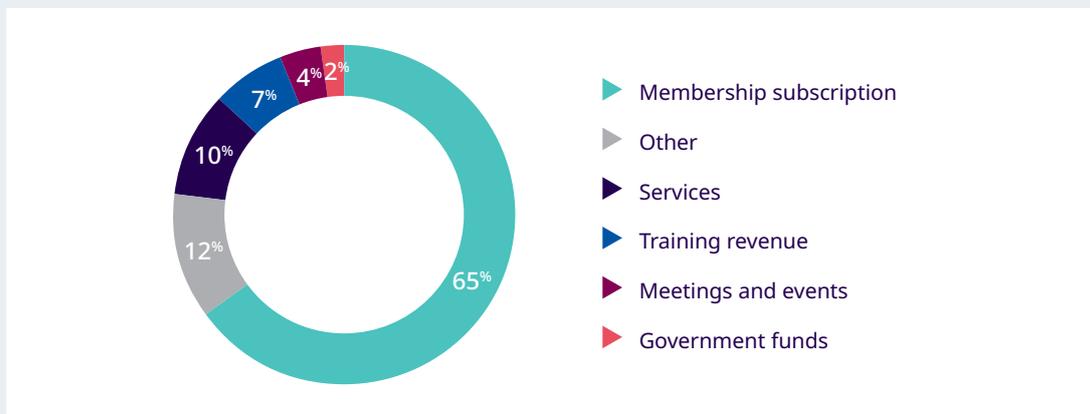
- ▶ Of surveyed EBMOs, 53 per cent reported that incentives were effective and 47 per cent reported that incentives were partially effective.

III. COVID-19's impact on EBMO income

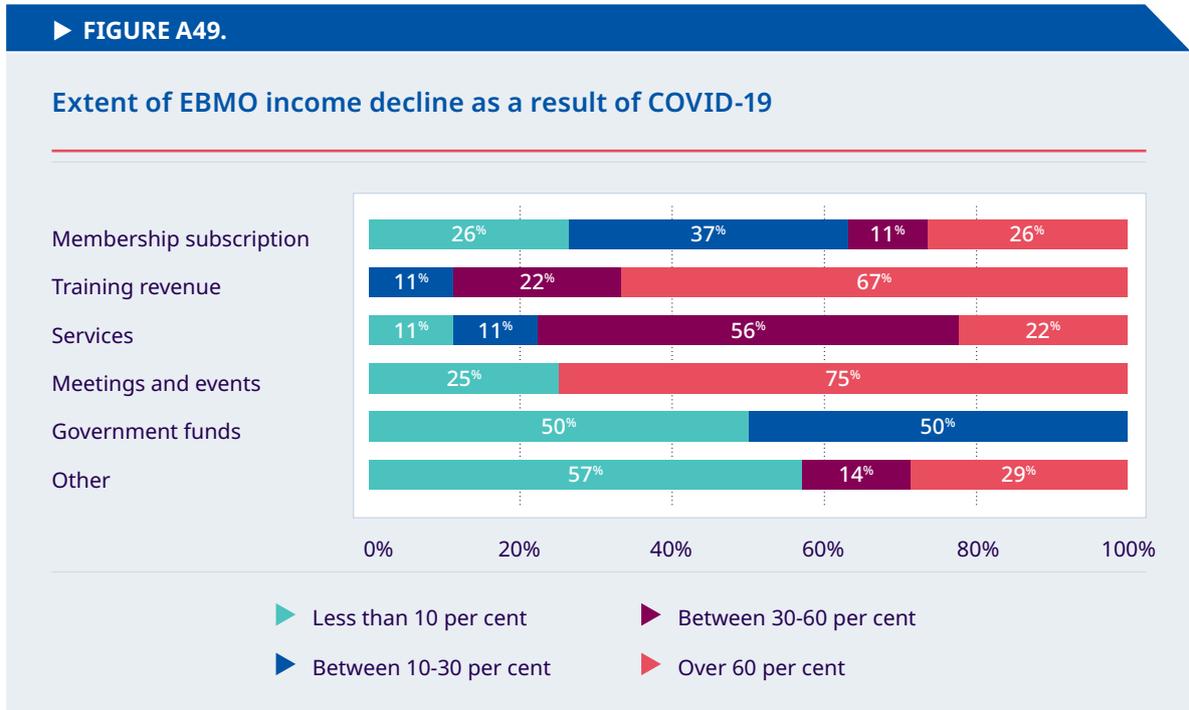
- ▶ EBMOs reported that 65 per cent of their income prior to COVID-19 came from membership subscription and 10 per cent from services such as representation, and legal and advisory services.

▶ **FIGURE A48.**

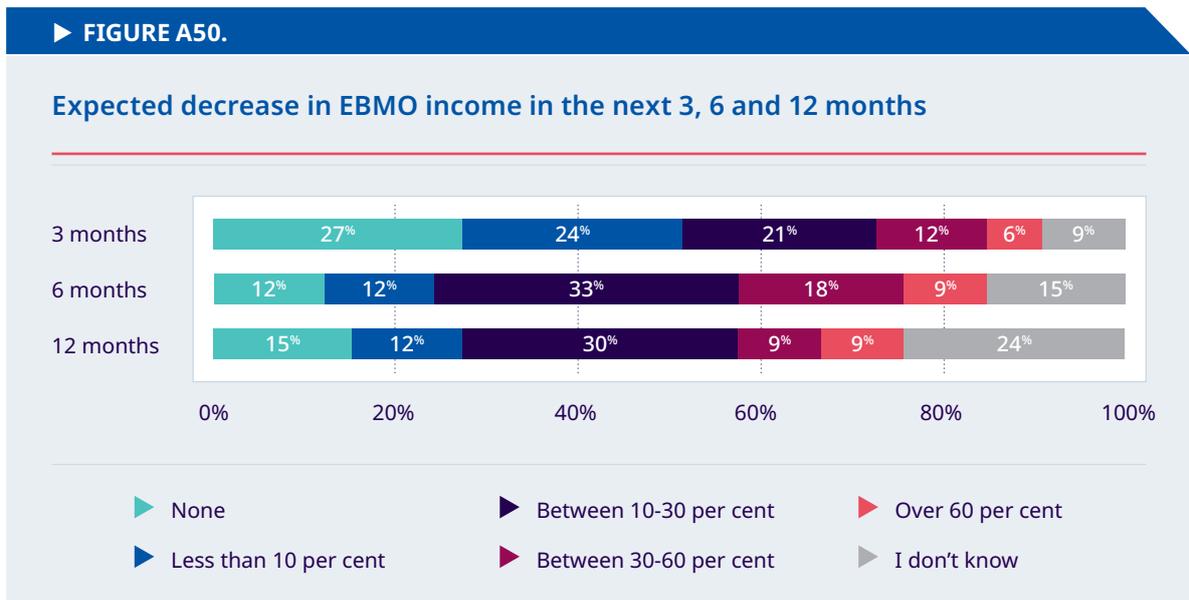
Average composition of the main income sources of EBMOs



- ▶ Sixty-four per cent of EBMOs reported income declines resulting from the COVID-19 crisis.
- ▶ During April-May 2020, 7 out of 10 EBMOs experienced income declines by more than 60 per cent from training revenue, and meetings and events.



- ▶ In the short-term (three months), 24 per cent of EBMOs surveyed in Europe and Central Asia reported that they expected a decrease in income by less than 10 per cent, and 21 per cent of EBMOs cited a possible income drop of 10 to 30 per cent.
- ▶ In the medium-term (six months), 33 per cent of EBMOs highlighted possible income reductions of 10 to 30 per cent, and 18 per cent of EBMOs cited potential loss of 30 to 60 per cent.
- ▶ In the long-term (one year), 30 per cent of EBMOs expected income declines of 10 to 30 per cent, and 12 per cent of EBMOs indicated that their income would decrease by less than 10 per cent.



- ▶ Of surveyed EBMOs, 79 per cent reduced travel costs, 48 per cent reduced staff costs and 42 per cent reduced external collaboration costs.
- ▶ Only 33 per cent of EBMOs had financial reserves or access to alternative sources to manage the impact of COVID-19.

IV. COVID-19's impact on EBMO workforce

- ▶ Of EBMOs that reduced staff costs, 69 per cent reduced working hours of some or all staff, 56 per cent reduced staff wages, and an equal share of 19 per cent had staff on unpaid compulsory leave or laid off staff.

▶ **FIGURE A51.**

Implemented cost-cutting measures to respond to income reduction



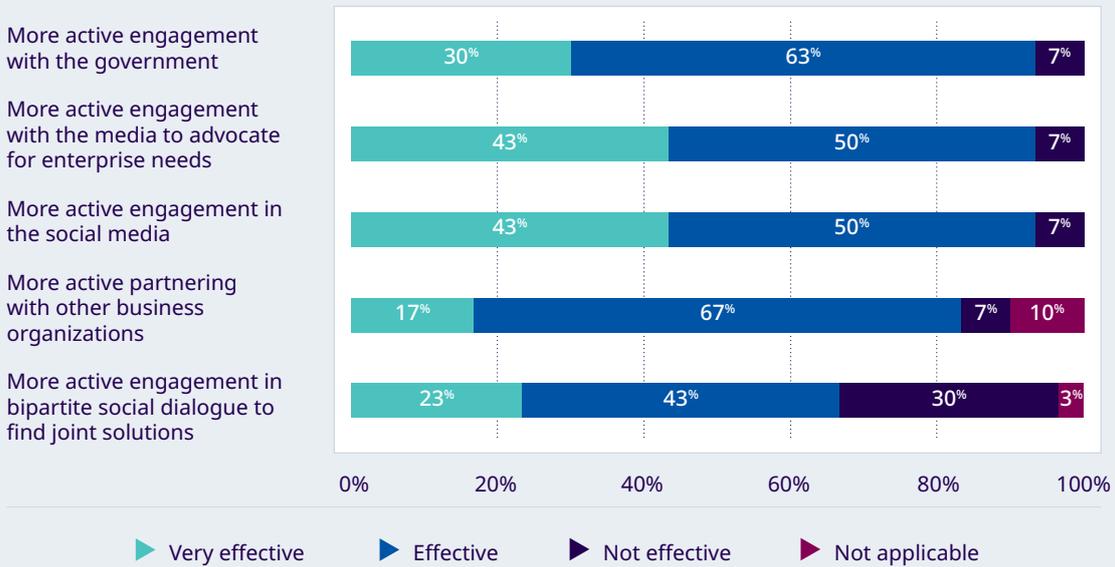
- ▶ One fifth of EBMOs expect to reduce their workforce in the next three months and 3 in 10 EBMOs anticipate downsizing staff in the next 6-12 months.

V. COVID-19's impact on EBMO advocacy activities and services

- ▶ Nine out of ten EBMOs in Europe and Central Asia increased advocacy initiatives to improve visibility during the COVID-19 crisis.
- ▶ All surveyed EBMOs engaged more actively with the government, engaged more actively with the media to advocate for enterprise needs and engaged more actively in social media. Ninety-seven per cent of EBMOs engaged more actively in bipartite social dialogue and 90 per cent of EBMOs partnered more actively with other business organizations.

▶ **FIGURE A52.**

Effectiveness of advocacy initiatives conducted to improve organizational visibility during COVID-19



- ▶ Eighty-five per cent of EBMOs changed their service delivery due to restrictions of movement imposed by authorities such as lockdown.
- ▶ Of EBMOs that changed service delivery, 86 per cent offered online advisory, legal and consulting services; 64 per cent offered online trainings; and 25 per cent offered other services including webinars and video conferences.

VI. Impact of COVID-19 on EBMO capacity and needs

- ▶ Of surveyed EBMOs, 52 per cent reported operating at full capacity, 33 per cent operated at three-quarters capacity, and 15 per cent operated at half per cent capacity. No EBMOs in Europe and Central Asia indicated a reduction in operational capacity to less than a quarter.
- ▶ The three most important areas where EBMOs needed support to better serve their members during the COVID-19 crisis were:
 - ▶ Enhanced representation for government support and responsive measures for enterprises (64 per cent);
 - ▶ Guidance/communication tools and policies on the value and role of the private sector in economic and social resilience, growth and prosperity (42 per cent);
 - ▶ Guidance on digital services for members (39 per cent).
- ▶ The three most relevant medium to long-term needs for change in EBMO business models and internal structure were:
 - ▶ Enhance EBMO leadership role during crisis and recovery (73 per cent);
 - ▶ Review EBMO membership services (70 per cent);
 - ▶ Review EBMO membership strategy to attract more members (48 per cent).

▶ Annex 2. EBMO survey questionnaire

I. General information

Which region are you located in?

Africa

Central Africa

Eastern Africa

Western Africa

Southern Africa

Northern Africa

Americas

Northern America

Central America

South America

Caribbean

Arab States

Asia and the Pacific

Eastern Asia

South-Eastern Asia

Southern Asia

Pacific Islands

Europe and Central Asia

Central Asia

Eastern Europe

Western Europe

Northern Europe

Southern Europe

II. How your EBMO's membership is changing as a result of COVID-19

For the purpose of this survey, "members" or "membership" refer to only direct members (both associations and companies).

1. What type of membership does your EBMO have? Select one answer.

Companies

Federations/associations (e.g. sectoral, regional, provincial associations)

Both

2. As a result of COVID-19, have members terminated their membership to your EBMO? Select one answer.

Less than 10 per cent

Over 40 per cent

Between 10-20 per cent

We have lost no members

Between 20-30 per cent

I don't know

Between 30-40 per cent

3. What is the likely reduction in the total number of members your EBMO anticipates in the next 3 months, 6 months and 12 months? Select the appropriate answer.

	3 months	6 months	12 months
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Less than 10 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 10-20 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 20-30 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 30-40 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over 40 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't know	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Does your EBMO offer any type of incentives to keep members?

Yes No

Proceed to question 4.1 if you have selected "yes" to question 4.

- 4.1 Which types of incentives does your EBMO offer? Select all that apply.

- Temporary reduction of member fees
- Postponement of deadlines for payment of membership fees
- Provision of new/additional/extra services free of charge
- Others (please describe)

Proceed to question 4.2 if you have selected "yes" to question 4.

- 4.2 Are these incentives effective?

Yes No Partially

III. How your EBMO's income is being affected as a result of COVID-19

5. Prior to COVID-19, what was the composition of your EBMO's main income source? Indicate the percentage of each income source (the total must add up to 100 per cent).

Income source	Percentage
Membership subscription	
Training revenue	
Services (e.g. representation, HR services, legal and advisory services, etc.)	
Meetings and events	
Government funds	
Other, please describe (e.g. technical cooperation funds, rent, public campaigns)	
Total	100%

9. Does your EBMO have any financial reserves or access to alternative/external sources to address the COVID-19 crisis?

- Yes No

Proceed to question 9.1 if you have selected "yes" to question 9.

9.1 What type of financial reserves or access to alternative/external sources to address the COVID-19 crisis? Select all that apply.

- Savings Loans Grants

Proceed to question 9.2 if you have selected "yes" to question 9.

9.2 Is this funding sufficient to remain operational for the next 6 months?

- Yes No
-

IV. Impact of your EBMO's workforce as a result of COVID-19

Proceed to question 10 if you have selected "staff costs" in your response to question 8.

10. In relation to your staff, what steps has your EBMO taken to respond to lost income? Select all that apply.

- Some or all staff are on reduced working hours (in combination or not with wage subsidies)
- Some or all staff have taken pay cuts
- Some or all staff are on unpaid compulsory leave
- Some staff have been laid off

Proceed to question 10.1 if you have selected "some staff have been laid off" in your response to question 10.

10.1 If your EBMO has laid off staff, what is the percentage of overall staff?

- 1-10 per cent 20-30 per cent Over 40 per cent
- 10-20 per cent 30-40 per cent
-

11. As a result of COVID-19, by how much do you expect your EBMO's staff to contract (as a result of layoffs or staff leaving) in the next 3 months, 6 months and 12 months? Select the appropriate range of staff reduction by future period.

	3 months	6 months	12 months
None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Less than 10 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 10-25 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Between 25-50 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over 50 per cent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't know	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

V. How your EBMO's services are being impacted and transformed due to COVID-19

12. Is your EBMO increasing its advocacy activities to become more visible as an organization representing the needs of enterprises in the crisis?

Yes No

Proceed to question 12.1 if you have selected "yes" in your response to question 12.

12.1 What did you do? Select all that apply and determine its effectiveness.

	Very effective	Effective	Not effective	Not applicable
More active engagement with the government	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More active engagement in bipartite social dialogue to find joint solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More active engagement with the media to advocate for enterprise needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More active engagement in the social media.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More active partnering with other business organizations (e.g. business coalitions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Proceed to question 12.2 if you have selected "very effective" or "effective" for the option on "more active partnering with other business organizations" in question 12.1.

12.2 Can you provide examples of joint COVID-19 related work conducted with other business organizations that helped your EBMO become more visible to enterprises? Please describe.

13. Has your EBMO changed the service delivery to react to COVID-19 related restrictions of movement or lockdown imposed by the authorities?

Yes No

Proceed to question 13.1 if you have selected "yes" for question 13.

13.1 How has your EBMO's service delivery changed? Select all that apply.

- We are offering virtual (remote) training
- We are offering virtual (remote) advisory, legal and consultancy services
- Other (please specify)

VI. How your EBMO's overall capacity and needs have changed due to COVID-19

14. At what capacity is your EBMO currently operating?

- At 100 per cent capacity At 50 per cent capacity
 Above 75 per cent capacity Below 25 per cent capacity

15. Which are the main needs (areas of support) of your EBMO to be better able to serve your members in the COVID-19 crisis? Select the top three (3) needs.

- Enhanced representation for government support and responsive measures for enterprises
 Guidance on remote work or teleworking policies
 Guidance on government measures made available for enterprises
 Guidance on dispute settlements
 Information on how to maintain staff
 Information on business continuity
 Guidance on digital services for members
 Guidance on the use of digital tools and how to speed up coherent digitalization processes adapted to EBMOs
 Guidance/communication tools and policies on the value and role of the private sector in economic and social resilience, growth and prosperity
 Other (please specify)

16. Has your EBMO encountered government restrictions during the COVID-19 crisis?

- Yes No

Proceed to question 16.1 if you have selected "yes" for question 16.

16.1 If yes, could you indicate in what respects or provide further explanations? Select all that apply.

- Government restrictions on EBMO freedoms (not related to isolation or lockdowns)
 Government restrictions on or suspension of the operations of social dialogue/institutions
 Non-consultation by the government on COVID-19 measures
 Other (please specify)

17. Do you foresee any medium to long-term needs for change in your EBMO's business model and internal structure? Select the most relevant three (3).

- Create alliances and consider mergers with other business organizations
 Enhance your EBMO's leadership role as the representative of the private sector during crisis and recovery
 Review your EBMO's membership strategy, e.g. to attract more diverse companies or organizations as members/affiliates
 Review the types and delivery of your EBMO's membership services, including the digitalization of services to strengthen connectivity and ensure continuity of delivery.
 Review your EBMO's mandate (e.g. broaden mandate beyond employment-related areas)

- Design an internal policy to increase your EBMO's resilience to future shocks
 - Review your EBMO's income structure and revenue sources
 - Review staff functions, competencies and performance
 - Other (please specify)
-

18. What has been the most effective thing your EBMO has done in terms of communication/ membership retention/ service adaption during COVID-19? Please describe.

VII. Suggestions for actions to be taken by the ILO-ACT/EMP and the IOE

19. In what areas does your EBMO require action to be taken by the IOE (e.g. lobbying, influencing global and local policy, support in communication, knowledge products, information sharing) at national or international level to help address the challenges EBMOs are facing? Please describe your proposal.

20. In what areas (e.g. training, tools, knowledge products, information sharing) does your EBMO feel the ILO-ACT/EMP should provide capacity development to your organization to support you during this crisis? Please describe your immediate needs as well as longer-term needs.

21. What technical assistance so far provided by IOE, ILO-ACT/EMP, the ILO or other development partners would be less or no longer needed?

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