



► ILO Brief

October 2026

Asia-Pacific EBMO survey

Labour, trade and responsible business conduct

Key points

- 96 per cent of respondents to the principal questions view trade, labour and responsible business conduct as relevant to members.
- 81 per cent report that business pressure has increased over the past two to three years.
- Funding (53 per cent) and staff capacity (47 per cent) are the most common barriers to expanding services.
- Technical expertise leads future ILO support priorities among respondents to that question (68 per cent; n=22); 14 per cent prioritize direct company support.

Purpose and context

Trade-related labour requirements, human rights due diligence and responsible business conduct have gained prominence through changing national regulation, trade and market-access requirements, customer expectations and supply-chain practices. ACT/EMP conducted this survey to understand how these developments are affecting employer and business membership organizations (EBMOs), how EBMOs are responding, and what forms of support they consider most useful. The survey is the principal evidence base for this brief; selected findings from ILO-supported enterprise research and project work are included only to provide context and illustrate issues identified by respondents.

Scope of the survey

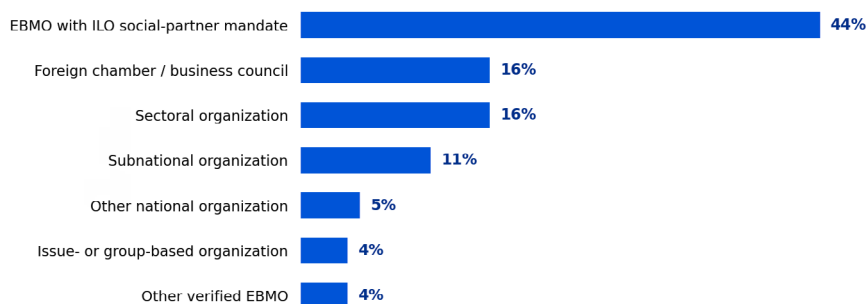
The survey is a descriptive regional exercise based on 60 eligible EBMO responses covering 22 countries and economies. It is intended to inform discussion of member demand, existing EBMO services and institutional

support needs; it is not a statistically representative estimate of all EBMOs in Asia and the Pacific.

Eligible partial responses were retained for every question answered. The base is therefore 60 for the respondent profile, 47 for the principal analytical questions (Q8-Q13), and 22 for the future ILO support question (Q14). Full eligibility and calculation details are provided in the methodological note.

Who responded

The respondent group is anchored in national employer representation while also including foreign chambers and business councils, sectoral bodies, subnational organizations and issue-based EBMOs. National EBMOs with the mandate to act as an ILO social partner account for 26 of the 60 eligible responses (43 per cent).

Profile of eligible respondents

Share of eligible respondents (n=55). Percentages may not total 100 because of rounding.

Southeast Asia accounts for 42 of the 60 eligible responses (70 per cent). East and North-East Asia accounts for seven responses (12 per cent), South Asia for six (10 per cent), the Pacific for four (7 per cent), and one organization reported global coverage (2 per cent). The distribution should be considered when interpreting the regional findings.

Countries and economies represented

The eligible responses cover 22 countries and economies: Bangladesh, Brunei Darussalam, Cambodia, China, Cook Islands, India, Indonesia, Japan, the Lao People's Democratic Republic, Malaysia, Mongolia, Myanmar, New Zealand, Pakistan, Palau, the Philippines, the Republic of Korea, Singapore, Sri Lanka, Thailand, Tuvalu and Viet Nam. Response numbers vary considerably by country, so the findings should not be interpreted as national estimates.

Importance for companies

A broad and intensifying agenda

Among the 47 EBMOs answering the principal analytical questions, 26 per cent describe the agenda as among the most important business priorities and 34 per cent as an important priority. A further 36 per cent say it matters

particularly for certain sectors or exporters. Together, 96 per cent treat the agenda as relevant to members.

Pressure is also rising: 40 per cent report a significant increase and another 40 per cent report some increase over the previous two to three years. Nine per cent report no material change, 6 per cent report a decrease and 4 per cent are unsure.

What is driving demand

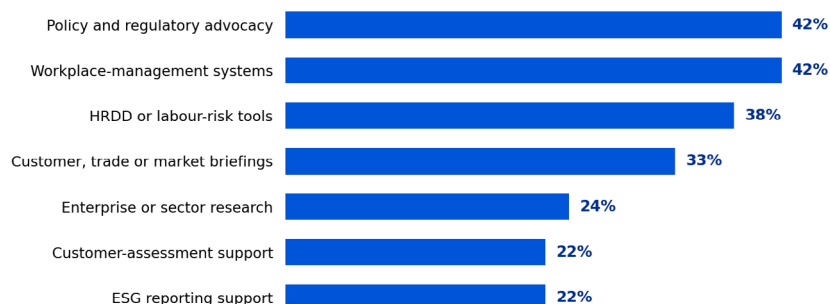
Maintaining market access or export competitiveness is the most frequently cited source of demand (47 per cent), followed by new national labour, HRDD or responsible-business regulation (40 per cent). Trade- or export-related labour requirements are cited by 36 per cent. Supply-chain mapping and traceability and ESG reporting are each cited by 34 per cent, while HRDD assessments are cited by 32 per cent. International buyer requirements are cited by 30 per cent. The pattern points to overlapping national, commercial, trade and supply-chain drivers rather than a single compliance channel. Selected ILO-supported enterprise research provides consistent context: a 2026 survey of 36 electronics manufacturers in Viet Nam found customer expectations encouraging improvements beyond legal compliance, while evidence from Malaysia, the Lao garment sector and company studies linked responsible business conduct with competitiveness and the need for practical tools. These separate sources are not included in the regional survey percentages.

Overall importance and change**Leading areas of member demand**

Q8-Q10 respondents (n=45). Multiple responses were permitted for Q10.

Services provided or planned by EBMOs

Current or planned EBMO services



Respondents to the principal analytical questions (n=45). Multiple responses were permitted.

The most common current or planned responses are policy advocacy and advice on workplace management systems, each reported by 43 per cent of respondents to the principal questions. Developing HRDD or labour-risk tools is reported by 38 per cent, briefings on customer, trade or market requirements by 36 per cent, enterprise or sector research by 26 per cent, support with customer assessments by 23 per cent and support with ESG reporting by 21 per cent.

Strong demand, but limited cost recovery

Member demand is increasing, yet 47 per cent of respondents provide relevant services free of charge. A further 28 per cent charge for only some services, 13 per cent report that services are mostly paid, and 9 per cent plan to introduce charges; 4 per cent are unsure. The findings show that cost recovery remains limited across

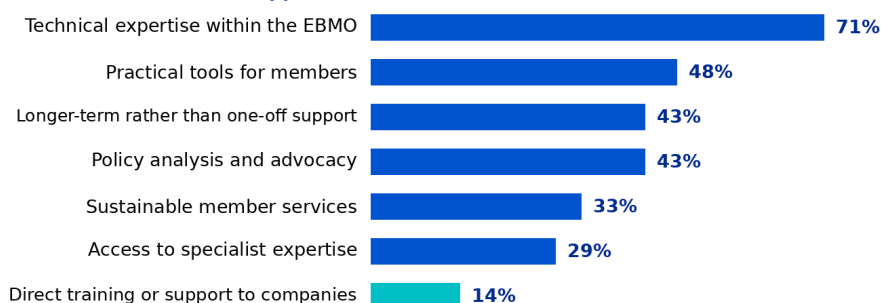
much of the respondent group, although the survey does not assess the profitability of individual services.

Capacity constraints affect service development

Funding is the most frequently cited barrier (53 per cent), followed by staff capacity (47 per cent). Gaps in HRDD, ESG or trade expertise are reported by 34 per cent. A lack of practical tools and difficulty keeping pace with changing requirements are each cited by 30 per cent, while limited willingness to pay is cited by 26 per cent. Read together with the cost-recovery results, these findings indicate that many EBMOs face constraints in investing in staff, expertise and service development.

Priorities for future ILO support

Priorities for future ILO support



Respondents to the future ILO support question (n=21). Multiple responses were permitted.

Respondents primarily favour support that strengthens EBMOs' own capabilities: 68 per cent prioritize technical expertise, 45 per cent practical tools, and 41 per cent each prioritize longer-term support and stronger policy analysis and advocacy. Sustainable member-service models and access to specialist expertise are each selected by 32 per cent. Direct ILO training or support to companies is selected by 14 per cent.

What the findings indicate

- The strongest signal is demand for technical depth that EBMOs can use themselves. Respondents favour access to current expertise, practical tools and longer-term capability development over parallel delivery directly to companies.
- The findings also connect institutional capacity with service sustainability. Funding and staffing constraints, combined with limited cost recovery, affect EBMOs' ability to maintain expertise and develop continuing member services.
- Policy analysis remains part of the demand. EBMOs report a need both to support enterprise implementation and to translate member experience into evidence for policy dialogue and advocacy.

Conclusion

The survey shows that trade, labour and responsible business conduct are already significant member concerns and that demand is increasing. EBMOs are responding through policy advocacy, workplace advice, practical tools and member briefings, but funding, staffing, specialist expertise and limited cost recovery constrain the scale and sustainability of these services. Respondents' priorities point to ILO support centred on strengthening EBMO capability through technical expertise, adaptable tools, policy analysis and longer-term institutional development.

Annex. Detailed question-by-question results

The following tables report all closed substantive questions. They use the denominator for each question rather than the overall eligible base.

Q8. How important are these issues to members?

Respondents assessed the importance of trade-related labour requirements, human rights due diligence and responsible business conduct to their members.

Response	Number	Share
Among the most important business priorities	12	26%
An important business priority	16	34%
Important mainly for particular sectors or exporters	17	36%
An emerging issue, but not yet a major business priority	1	2%
A relatively minor issue	1	2%

Base: n=47. Percentages may not total 100 per cent because of rounding.

Q9. How has business pressure changed?

Respondents assessed changes over the previous two to three years.

Response	Number	Share
Increased significantly	19	40%
Increased somewhat	19	40%
Stayed about the same	4	9%
Decreased	3	6%
Not sure	2	4%

Base: n=47. Percentages may not total 100 per cent because of rounding.

Q10. On which issues are members increasingly seeking support?

Respondents could select all applicable issues.

Response	Number	Share
Maintaining market access or export competitiveness	22	47%
New national labour, HRDD or responsible business regulation	19	40%
Trade- or export-related labour requirements	17	36%
Supply-chain mapping and traceability	16	34%
ESG reporting requirements	16	34%
HRDD and labour-risk assessments	15	32%
International buyer requirements	14	30%
Recruitment, grievance or workplace-management systems	12	26%
Investor or lender labour and ESG requirements	12	26%
Labour issues identified through buyer audits or assessments	11	23%
Other	3	6%
None of these topics	2	4%

Base: n=47. Multiple responses were permitted; percentages can total more than 100 per cent.

Q11. What are EBMOs doing or planning to do?

Respondents could select all applicable current or planned responses.

Response	Number	Share
Advocate on new policies or regulations	20	43%
Advise companies on workplace-management systems	20	43%
Develop HRDD or labour-risk tools	18	38%
Brief members on buyer, trade or market requirements	17	36%
Conduct enterprise or sector research	12	26%
Support companies with buyer audits or assessments	11	23%
Support companies with ESG reporting	10	21%
Other	4	9%

Base: n=47. Multiple responses were permitted; percentages can total more than 100 per cent.

Q12. Are services provided on a paid basis?

This question examined whether EBMOs recover costs from the services they provide or plan to provide.

Response	Number	Share
No - provided free to members	22	47%
Yes - some services are paid	13	28%
Yes - services are mostly paid	6	13%
Not yet, but charges are planned	4	9%
Unsure	2	4%

Base: n=47. Percentages may not total 100 per cent because of rounding.

Q13. What are the main barriers to responding?

Respondents could select up to three barriers.

Response	Number	Share
Advocate on new policies or regulations	20	43%
Advise companies on workplace-management systems	20	43%
Develop HRDD or labour-risk tools	18	38%
Brief members on buyer, trade or market requirements	17	36%
Conduct enterprise or sector research	12	26%
Support companies with buyer audits or assessments	11	23%
Support companies with ESG reporting	10	21%
Other	4	9%

Base: n=47. Multiple responses were permitted; percentages can total more than 100 per cent.

Q14. What should future ILO support focus on?

Respondents could select up to three priorities.

Response	Number	Share
Build technical expertise within the EBMO	15	68%
Develop practical tools for members	10	45%
Provide longer-term support rather than one-off activities	9	41%
Strengthen policy analysis and advocacy	9	41%
Develop sustainable member services	7	32%
Provide access to specialist expertise	7	32%
Strengthen collaboration among national, sectoral and regional EBMOs	4	18%
Provide direct training or support to companies	3	14%
Provide market intelligence and enterprise or sector data	1	5%

Base: n=22. Multiple responses were permitted; percentages can total more than 100 per cent.

Q15. What one change would make ILO support more useful?

Ten respondents answered the open-ended question. Recurring themes included more practical, timely and tailored assistance; longer-term technical and financial support; access to specialist advice; direct advocacy support; regional and subregional peer learning; closer continuing collaboration; and support for balanced regulatory approaches that protect rights without unnecessarily constraining enterprise growth and investment. Given the small response base, these comments should be treated as illustrative.

Methodological note

This brief reports descriptive results from the final Asia-Pacific EBMO survey export of 9 September 2026. Percentages are rounded to the nearest whole number. Multiple-response items can total more than 100 per cent. Two identifiable EBMOs recorded under “Other” were retained; two private companies and five records without an identifiable organization type were excluded. Eligible partial responses were included for every question answered. The resulting bases are n=60 for the respondent profile, n=47 for the principal analytical questions and n=22 for the future-support question.



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