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International Symposium on The Business of Representing Business

Survey Report

ACT/EMP
The Bureau for Employers' Activities

The Bureau for Employers' Activities:

ILO Survey of Employers' Organizations

2010

5-6 September 2011 - Geneva, Switzerland

The Business of Representing Business

Contents

Introduction

In 2010 the ILO Bureau for Employers' Activities conducted a survey of national-level employers' organizations in the framework of a wider project to better understand what is changing in the business of representing employers at the national level. Twelve year after the last survey, the 2010 survey sought to explore four fundamental questions:

1. What is the current value proposition of national representative business and employer organizations, and is it likely to change in the next few years?

2. How are these organizations responding (or not) to a changing environment and changing demands from membership?

3. What kinds of organizations does business need in the coming years and what should these organizations be doing?

4. What needs to change in terms of vision and approach, and how can this change be brought about?

The questionnaire (Annex 1) was addressed to national level employers' organizations that participate in the ILO and pursued five lines of investigation:

- Is there any sign that the value of membership in employers' organizations is changing?

- Is there any change in the kind of benefits enterprises want from their membership in employers' organizations—how are labour market services faring?

- Where do employers' organizations see constraints in their business environment?

- To what extent is the structure of business representation changing?

- Has the recent financial crisis had an impact on employers' organizations?

Sections 1 and 2 of the questionnaire sought to classify the respondents according to composition of membership. The countries were then further classified according to regional and World Bank income-level groups, the International Finance Corporation's Doing Business Index rating, and ILO statistics on trade union density. The analysis presented here uses only the region and income level categories, but the other categories could be made available for further inquiries should that be of interest.

The rest of the questionnaire seeks to explore internal and external indicators that may signify change in the value proposition of representative business organizations:

- Section 3 asks about sources of revenue and any changes that are taking place in that respect, looking for indicators of change in membership needs.

- Section 4 looks at changes in staff deployment and strategic planning.

- Section 5 inquires after changes in services, and Section 6 looks specifically into labour market services.
- Section 7 takes a look at a range of potential competition that business organizations might face and their relationships with trade unions.
- Section 8 asks about the effects of the financial crisis on membership and revenues.

It was a complex exercise. Of the 140 organizations approached, 83 responded[1], from all regions. They represented a broad range of national circumstances, including all stages of development and levels of economic diversity, and an even spread on the ease of doing business index. A full list of the organizations that responded is provided in Annex 2. We wish to thank them all for the considerable effort they put into this.

The hosting of the survey website, the design of the electronic questionnaire and statistical analysis of the responses was done by Connection Research (www.connectionresearch.com.au). We thank them, and in particular their Research Director Graeme Philipson, for managing a very complex set of data that arrived in four languages.

The results of this survey do not explain everything. The sample consisted of a very specific segment of business representation, the national level employers' organization. In most countries the structure of business representation is very complex, with different levels of organization and groupings of industrial sectors providing either complementary or competing services. Even within the sample that responded to the survey, the wide variety of organizations and the diverse political and institutional environments in which they each operate mean that more inquiry is necessary to better understand what lies behind the data.

Overall, the message emerging from the survey is positive. Only 13 percent of the respondents reported a decrease in membership over the last 5 years, as compared to 75 percent that reported increases and 12 percent that remained stable. Subscription fees remain the most important source of revenue, though in low-income countries it accounts for less than half of total income. There is very strong confidence in the importance of representation services going into the future, especially in employment, labour and social affairs, and economic matters.

Even allowing that respondent incumbency is likely to have had an effect on the overall responses, they do reflect the direction of underlying trends. Particular note should be taken of the difficulties and challenges mentioned in the responses, since they are likely to indicate areas where business associations need to pay special attention in the years to come.

[1] 15 from Africa, 20 from the Americas, 30 from Asia-Pacific, 18 from Europe

Technical note

The income-level classification of countries was done according to the World Bank's World Development Report 2010, except that the present analysis does not differentiate OECD and non-OECD high income countries.

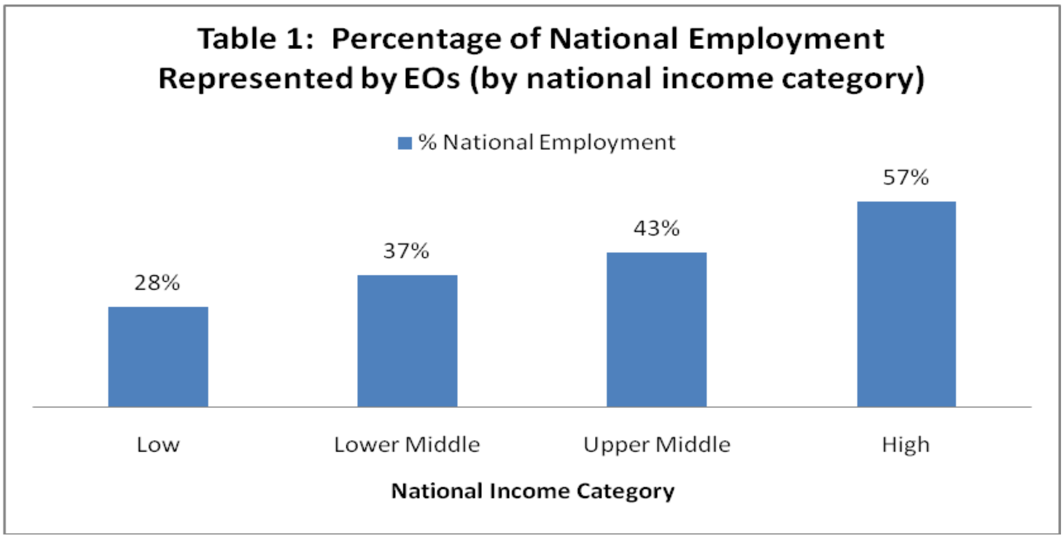
The WDR 2010 classifies economies by gross national income per capita, and uses the following income classifications: low income, $975 or less; middle income, $976 to $11,905; and high-income, $11,906 or more. The data used is from 2008.

The regional classification is based on the ILO's membership grouping for regional meetings. They consist of the following:

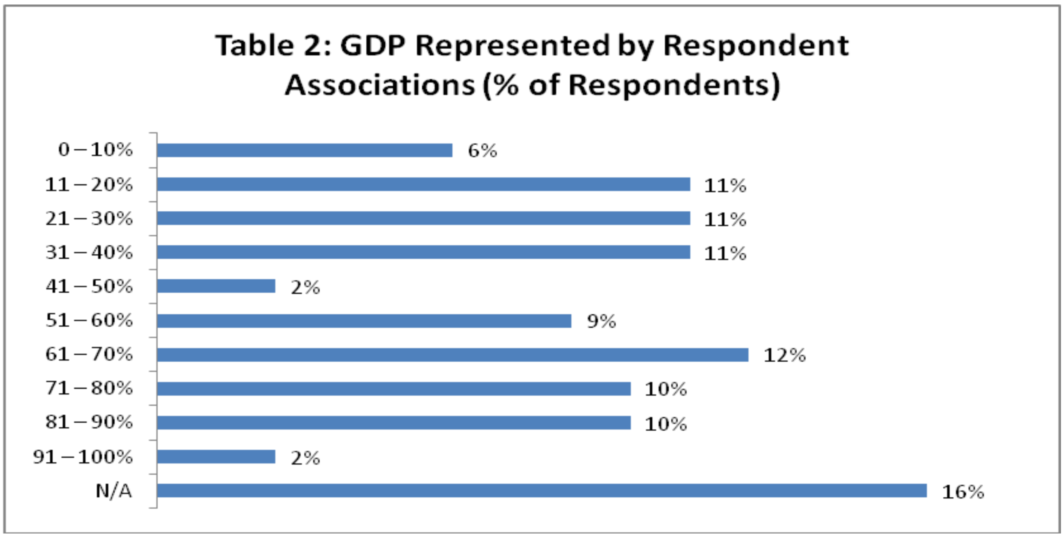
- -Africa
- Americas
- Asia-Pacific (including the Arab States of West Asia and Oceania, excluding the Central Asian Republics that were formally a part of the Soviet Union)
- Europe (including Turkey, Israel and the Central Asian Republics that were formally a part of the Soviet Union)

1. Membership & Structure

In terms of representativeness, organizations in more developed countries tended to represent a higher proportion of national employment than those in poorer countries. This is consistent with previous observations and is likely to be a reflection of the size of the informal sector in developing economies, as well as generally lower levels of organization in those countries.

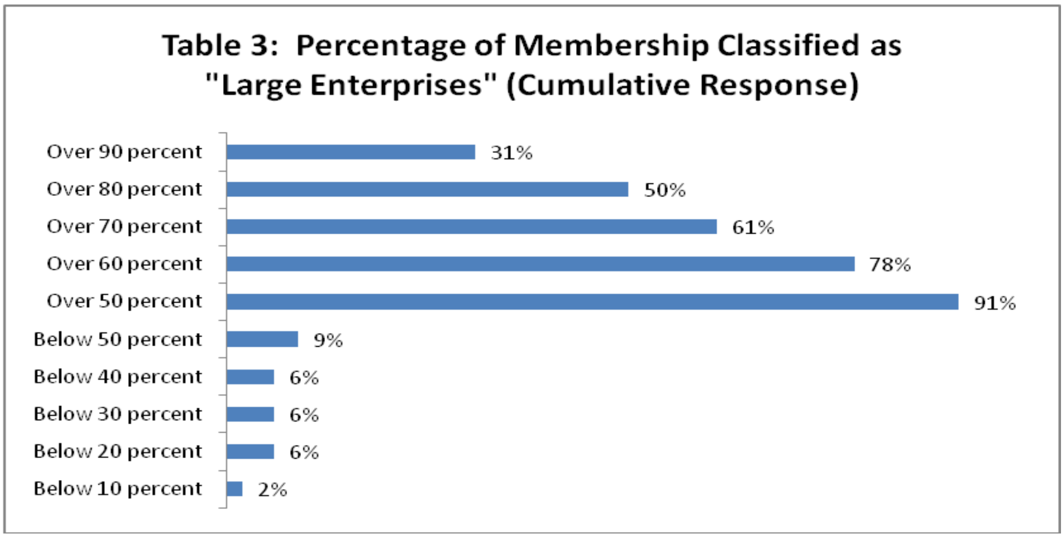


With respect to proportion of national income represented in membership about half of those who responded said they represented half or more of the GDP of their respective national economies. The numbers show a more or less normal distribution, though there is little explanation for the curious dip in the fifth decile.



Of the 71 respondents that answered the question on whether there were major categories of business outside of their membership, 39 responded in the negative while 32 responded in the affirmative.

The vast majority of organizations (91%) responded that large enterprises made up a majority of their membership. In fact, half the respondents had more than 80 percent of their members classified as large, whereas only 6 percent reported large enterprises as representing less than 20 percent of membership.



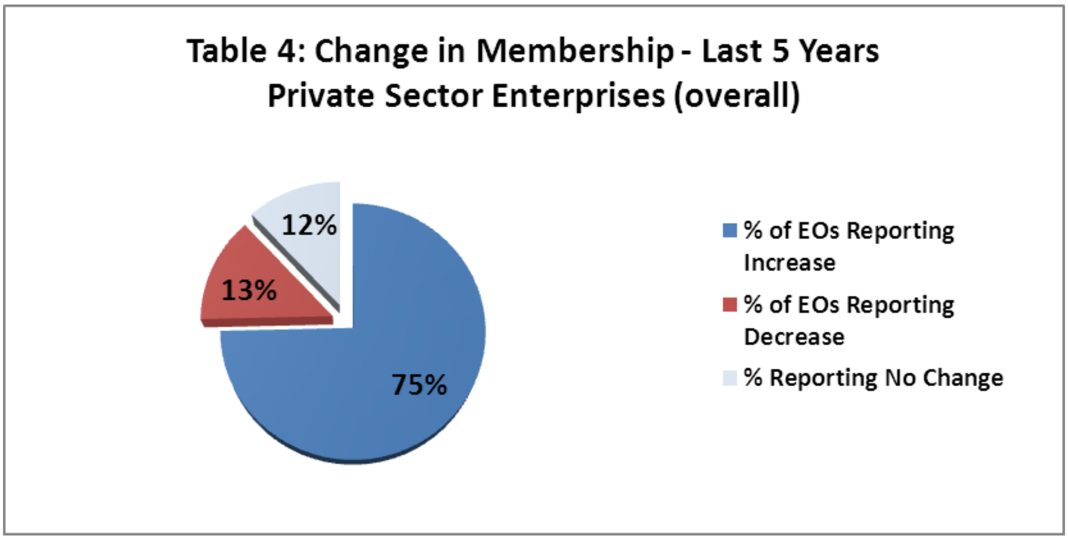
However, of the 56 organizations that reported on the number of enterprises covered within membership, 39 included small businesses. That was higher than the 31 that reported public sector enterprises and 11 that included public authorities in membership.

At the same time, while the responses to the question on groups of enterprises that were not a part of membership appear too varied to draw many conclusions, in the area of private sector voluntary membership, small businesses appear to be the most significant non-members.

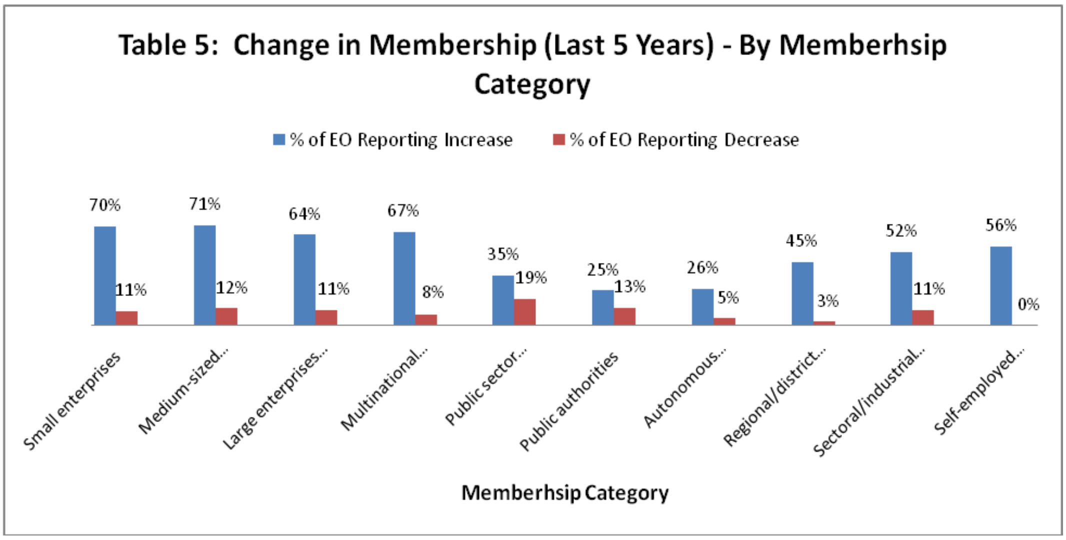
Optimism for membership growth

The statistics on changes in membership numbers paint a very positive picture of the last 5 years (until 2010). While some EOs reported decreases in membership associated with the global financial crisis of 2008, it appears that membership numbers in general were not significantly affected.

The chart below indicates that over the last 5 years 75% of the responding EOs saw an increase in membership, while only 13% saw a decrease. Most of the decrease was in Latin America and the Asia-Pacific, while Europe and Africa reported the most increase.



Disaggregating this information into categories of membership provides a better idea of where this growth in membership is coming from.

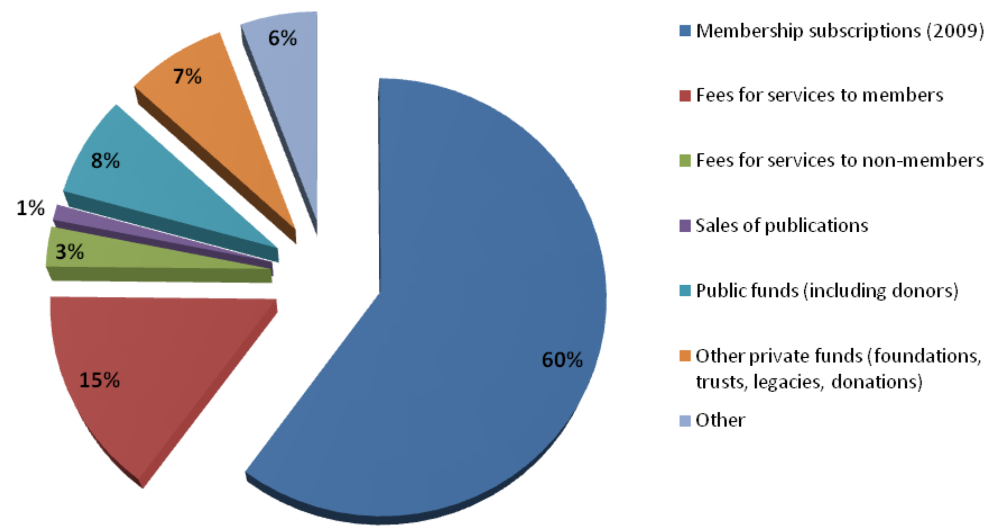


The chart above shows that employers' organizations are experiencing the most growth from the small and medium sized enterprise categories. It is also interesting to note that over 50% of respondents surveyed reported an increase in membership from the self-employed category, an area that has not been traditionally associated with EOs in the past.

2. Revenue

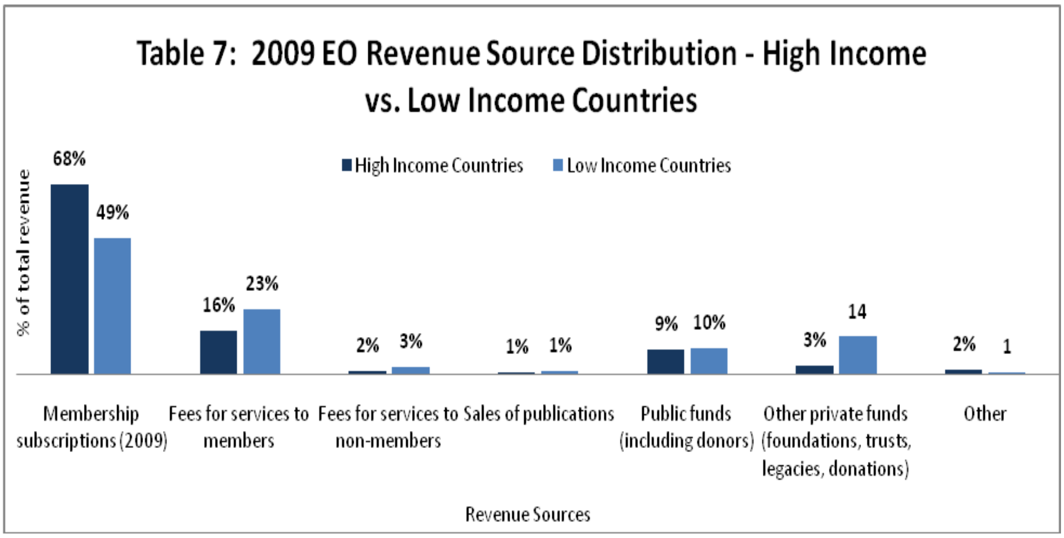
The table below offers a view of the global situation regarding revenue sources for EO (as in 2009). Membership subscription provides an average of 60% of the revenue for EOs worldwide. This may in part be explained by the fact that the respondents were all peak organizations in their respective countries, and direct services tend to be offered local and industry-specific organizations, but the survey did not examine that aspect.

Table 6: 2009 EO Revenue Source Distribution (average total)



The following chart (Table 7) compares the composition of revenue sources between high-income country organizations and those in low-income countries. It is interesting to note the difference in the size of income from subscriptions and from fee-based services, in particular.

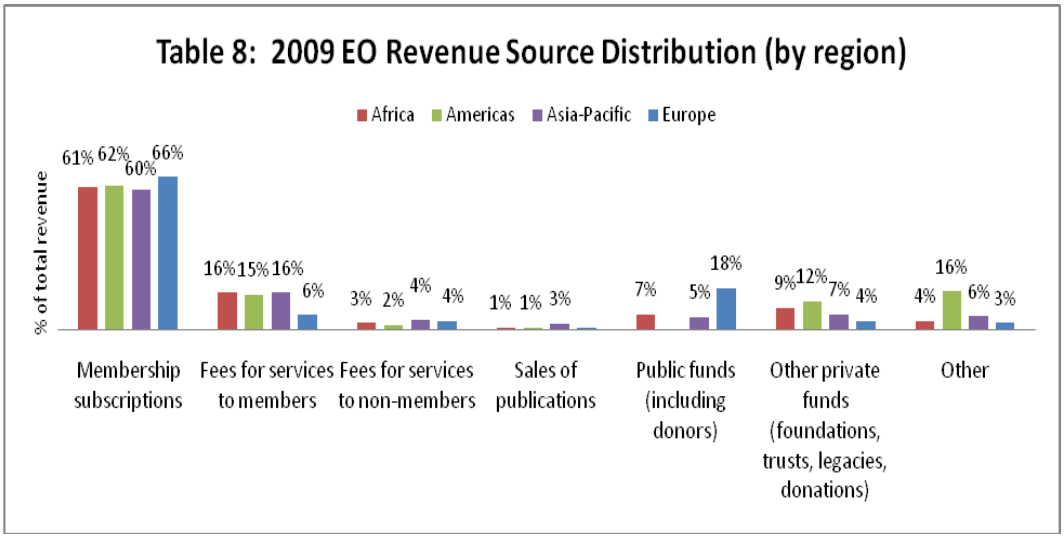
While high-income countries recieve close to 70% of their revenue from membership subscription, EOs from low-income countries barely receive half of their revenue from subscriptions. When this same data is analysed accoring to regions (as in Table 8) however, this disparity is much more balanced.



It is also interesting to note the difference in revenue obtained through fees for services to members, with respondents from low-income countries receiving nearly 10% more in this areas.

Another point that should be made is in reference to a developing trend that came through in the comments made by respondents in high-income countries, that they were increasingly pursuing advertising and sponsorship opportunities as a means of increasing overall revenue.

It should be noted when looking at the table below that events and projects typically form a significant source of income in Latin America, while donor support is important in Africa.



The projections below (Table 10) show that membship subscriptions and fees to members should continue to make up the most significant sources of revenue, although a developing trend towards increasing revenue from fees to non-members is also apparant.

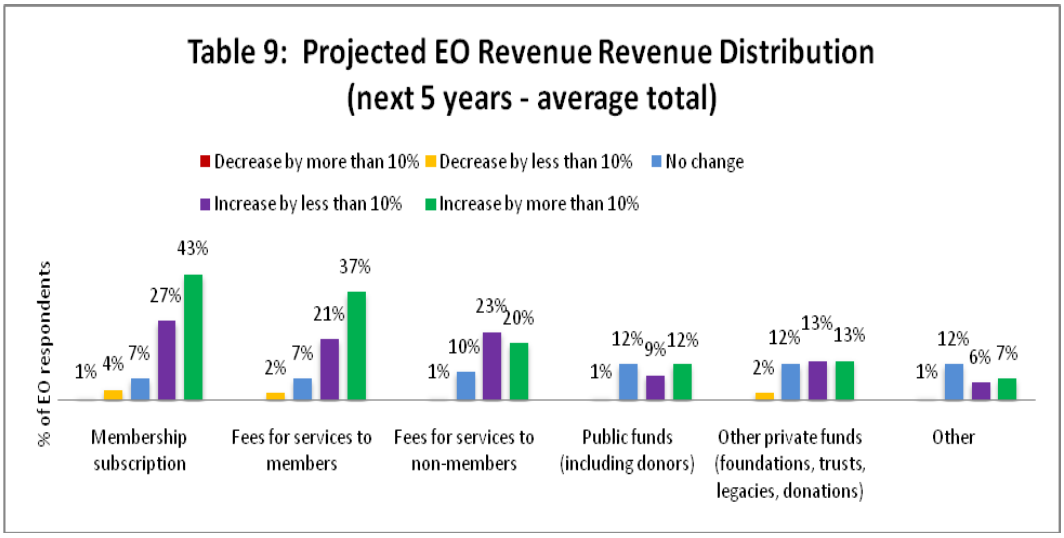
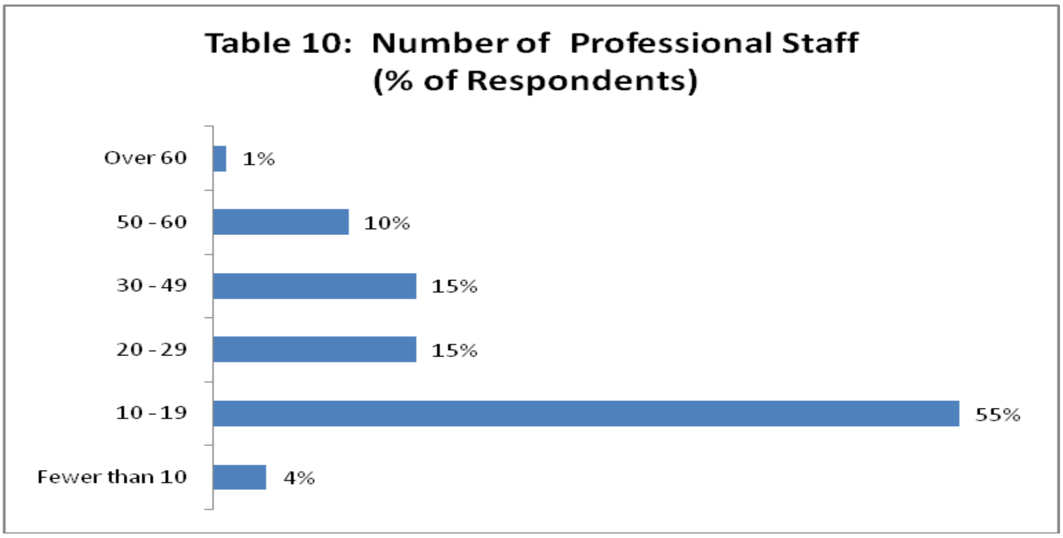


Table 9: Projected EO Revenue Revenue Distribution
(next 5 years - average total)
Decrease by more than 10%
Decrease by less than 10%
No change
Increase by less than 10%
Increase by more than 10%
% of EO respondents
1%
4%
7%
27%
43%
2%
7%
21%
37%
1%
10%
23%
20%
1%
12%
9%
12%
2%
12%
13%
13%
1%
12%
6%
7%
Membership subscription
Fees for services to members
Fees for services to non-members
Public funds (including donors)
Other private funds (foundations, trusts, legacies, donations)
Other

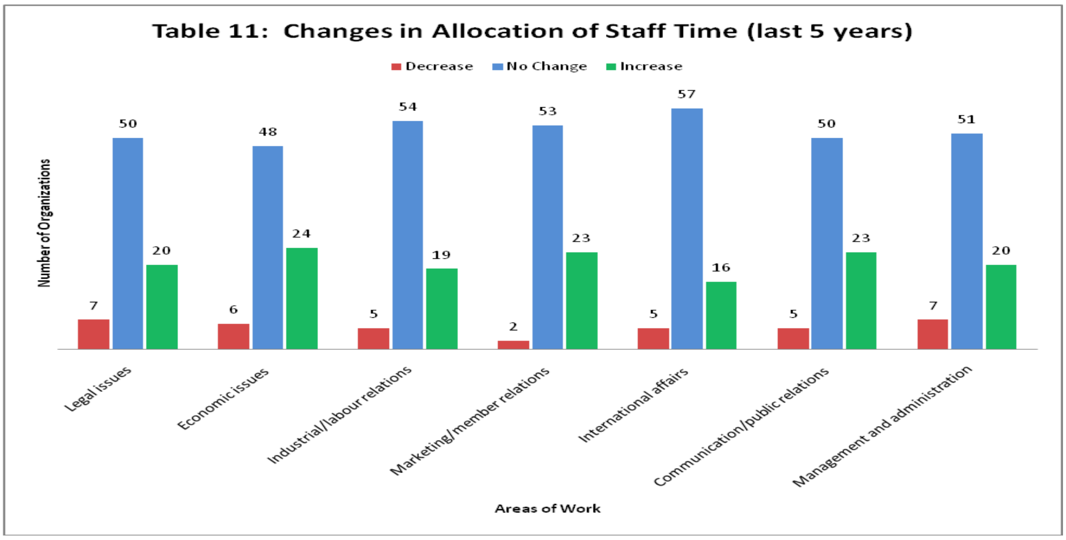
3. Staff

Fifty-five percent of the respondent organizations reported that they have between 10 and 19 professional staff.



The survey sought information on the time spent by staff in different work areas, as a possible indicator of changing priorities in response to performance or membership needs. It should be noted that these figures only indicate relative change within specific areas of work. The relative importance between those areas of work was covered in Section 4.

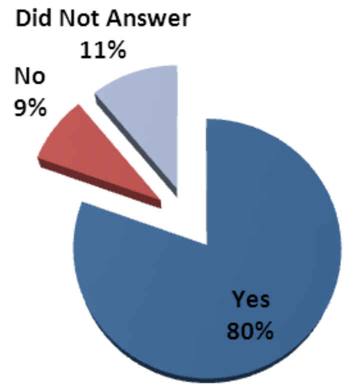
The allocation of staff time in respondent organizations shows only slight changes between recent experience and expectations for the future, but where change has been reported, the greatest net increases appear to be in economic issues, marketing and communications with the greatest net decrease in time spent in management activities.



There is probably more to these numbers than the allocation of staff time indicators reveal, because 57 percent of the respondents indicated that they underwent major staff restructuring in the last five years, compared to 25 percent, which did it more than five years ago. The survey did not delve into more detail with respect to this aspect.

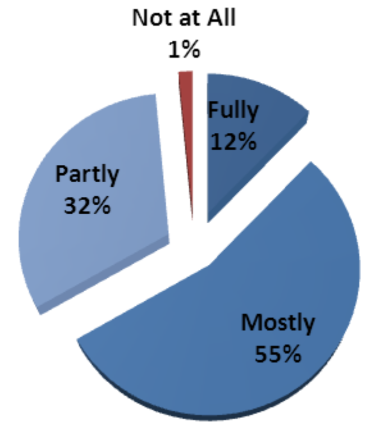
On the other hand, 80% of all respondents indicated that their organization has a strategic plan.

Table 12: Does Your Organization Have Strategic Plan?



However, only 12% say they have fully implemented their plan, and 55% responded with "mostly implemented" while 32% responded "only partly".

Table 13: How Fully Has Your Organization's Strategic Plan Been Implemented?



This, as well as the figures for the planned review of strategic plans, may well be indicative of the degree of pressure for change experienced by business associations. It should be noted that all of the EOs that responded that their strategic plan was fully implemented also responded that their plan was regularly reviewed (Table 14).

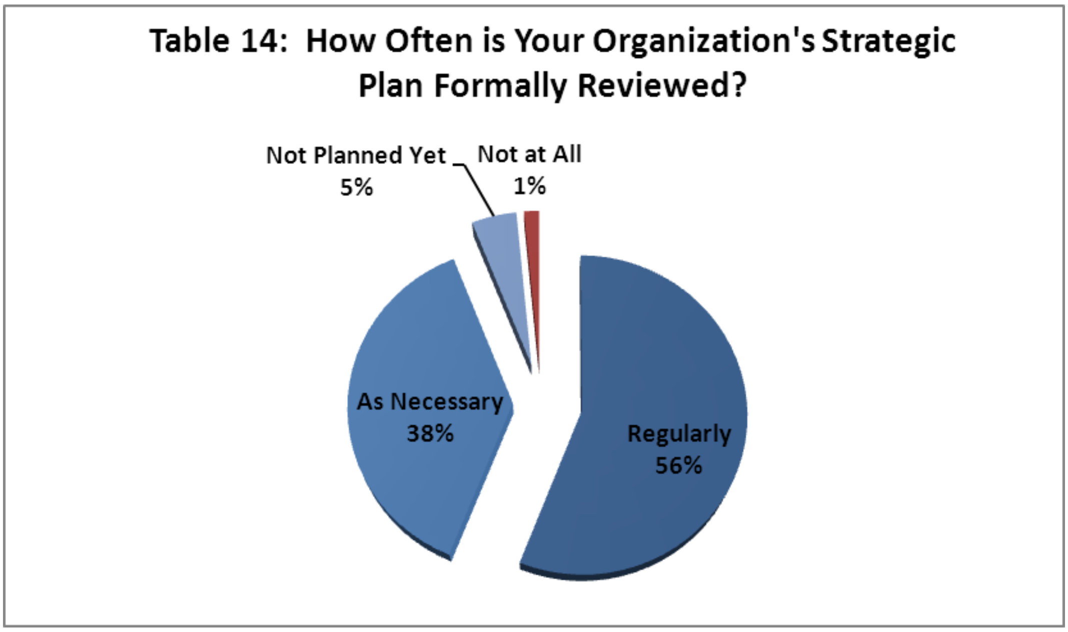


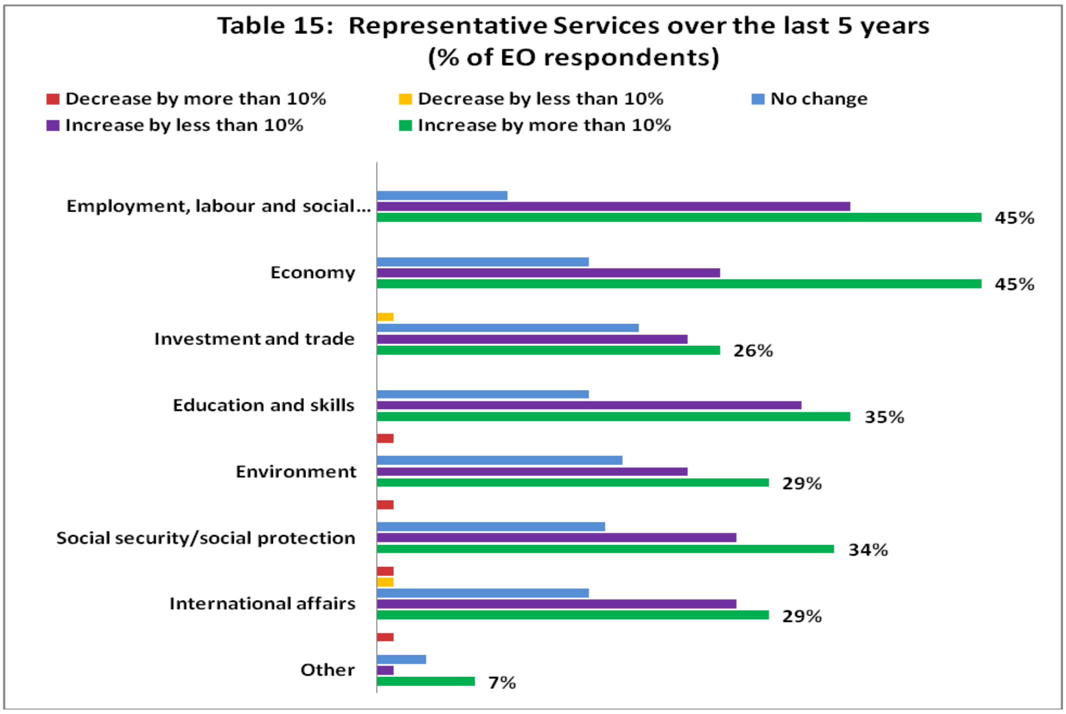
Table 14: How Often is Your Organization's Strategic Plan Formally Reviewed?
Not Planned Yet 5%
Not at All 1%
As Necessary 38%
Regularly 56%

4. Services

Representation, lobbying and advocacy

The following two sections deal with the mandate and services of EOs, namely representative services and direct services to members.

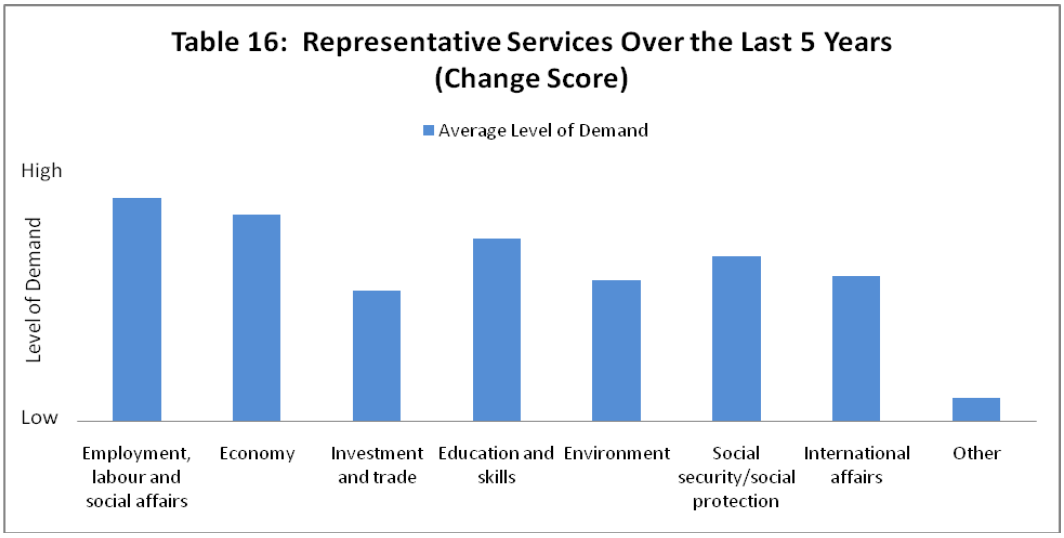
The survey questions corresponding with this section asked EOs to evaluate their representative and direct services based on how much the demand for these services had either increased or decreased over the past 5 years, and then asked them to predict what the demand for these services would be over the next 5 years. The chart below presents the overall response from EOs concerning the increase or decrease in demand for representative services over the last 5 years in each policy area.



While the above table displays a lot of information, having 5 levels of demand makes it difficult to compare the real demand in one policy area to the other. In an effort to make it easier to compare the data, an aggregate "change score" was developed to give a weighted value[2] to the amount of increase or decrease in demand that EOs had experienced in the

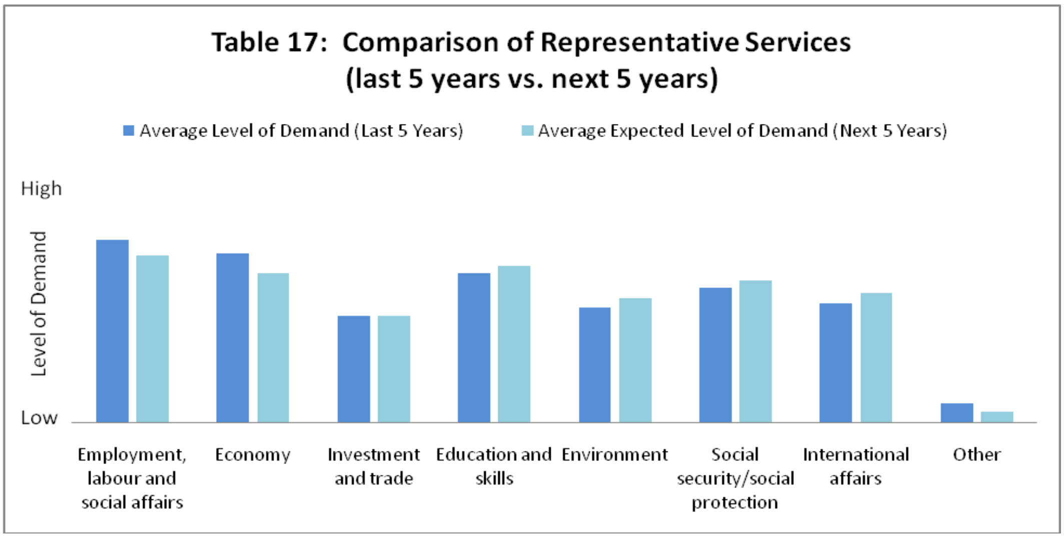
[2] To establish the change scores a weighted value was given to each response level. Each response of *decrease by more than 10%* were given a value of -2, while each response of *increase by more than 10%* was given a value of +2 with the other responses levels assigned values on the same scale. Using this method allows for a more holistic picture of the overall demand or impact felt in each category. While these scores do not have any value on their own, they allow for easier comparison between categories.

past and were predicting for the future. By using this change score, it is possible to determine the average demand in each policy area. It is this information that is presented in the chart on the next page (Table 16).



The chart above indicates that on average EOs experienced a growth in demand in each policy area, with employment, labour and social affairs, the economy, education and skills experiencing the most significant increase. It is important to recognize that this chart does not reflect the overall level of service, only how much the demand for that services has increased or decreased.

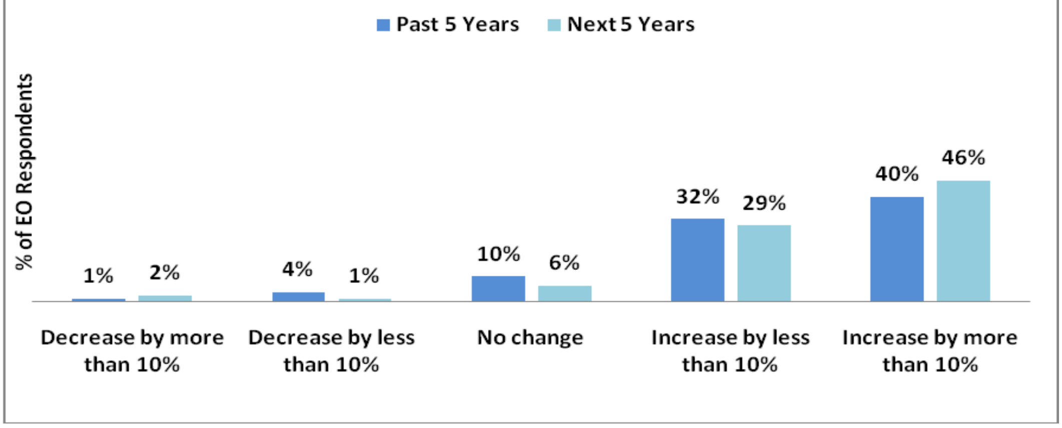
Using the same formula, it is possible to compare the level of demand from the past 5 years with the level of expected demand.



It is evident from the data in the table above that for the most part the level of expected demand matches the level of demand from the last 5 years. Minimal difference are noticeable in the employment and economy areas, which makes sense as EOs move past the events of the 2008 crisis, while education, environment, social security and international affairs are all future looking areas that deal with the issues of tomorrow, making the slight increase in those areas understandable.

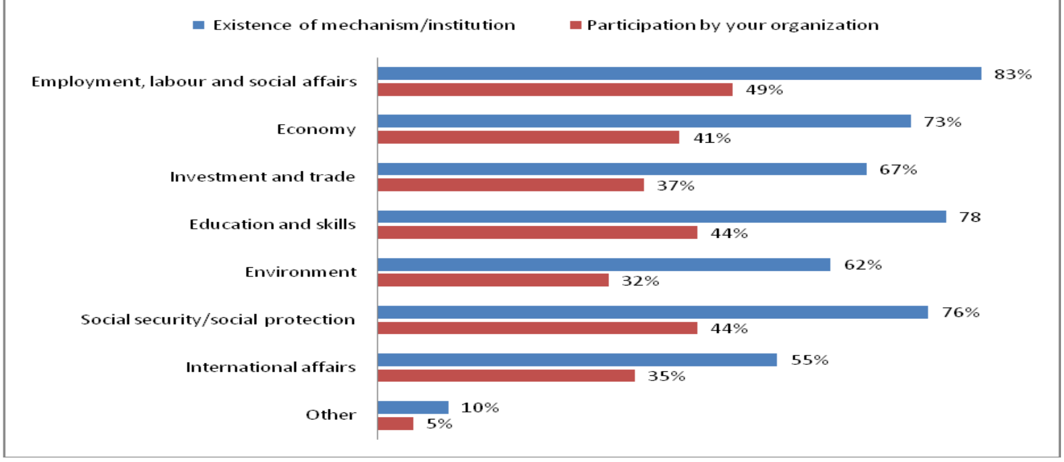
When it comes to labour market matters, to no surprise, lobbying and advocacy activities are up across the board, with EOs giving every indication that this trend will continue into the next 5 years with close to 50% responding that a more than 10% increase in activity is expected.

Table 18: Change in Lobbying and Advocacy Activity (Labour Market) Past vs. Projections



It appears that where formal consultation mechanisms exist to participate in the formation of public policy, the responding organizations were not always present.

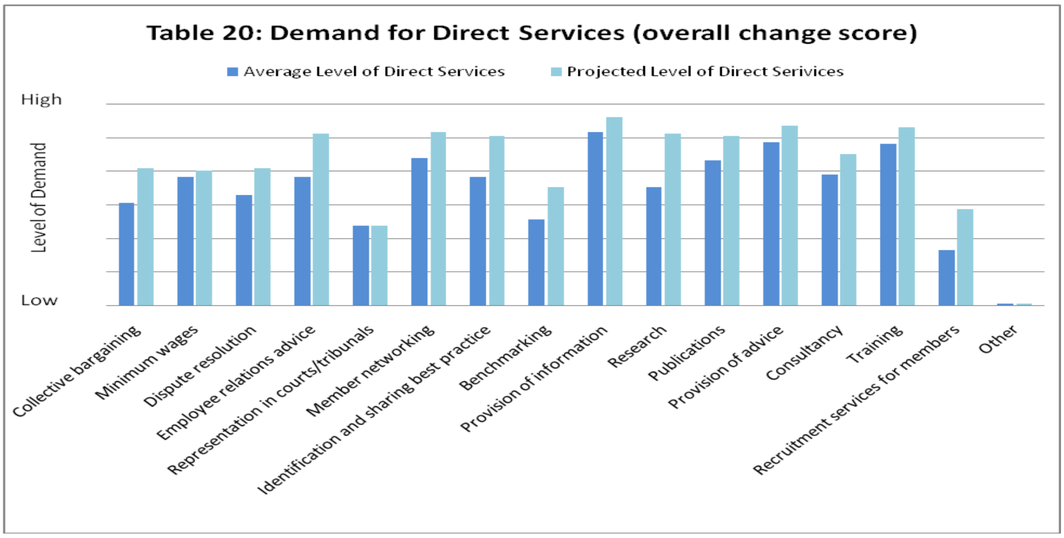
Table 19: Formal Consultation Mechanisms - Existence vs. Participation (% of Respondents)



Given the fact that the organizations were those that represented their country's business community in the ILO, employment and social affairs were the areas that saw the highest level of participation.

Direct services

Using the same "change score" method that was used to evaluate the responses on representative services to find the average level of demand for direct services, it becomes easy to see which direct labour market services have been in steady demand over the last 5 years. Comparing this data with the responses from employers' organizations on which direct services are projected to be in demand can provide organizations with an idea of where the priorities of their members may be shifting towards and provide some indication of where to focus energy and resources in the future.

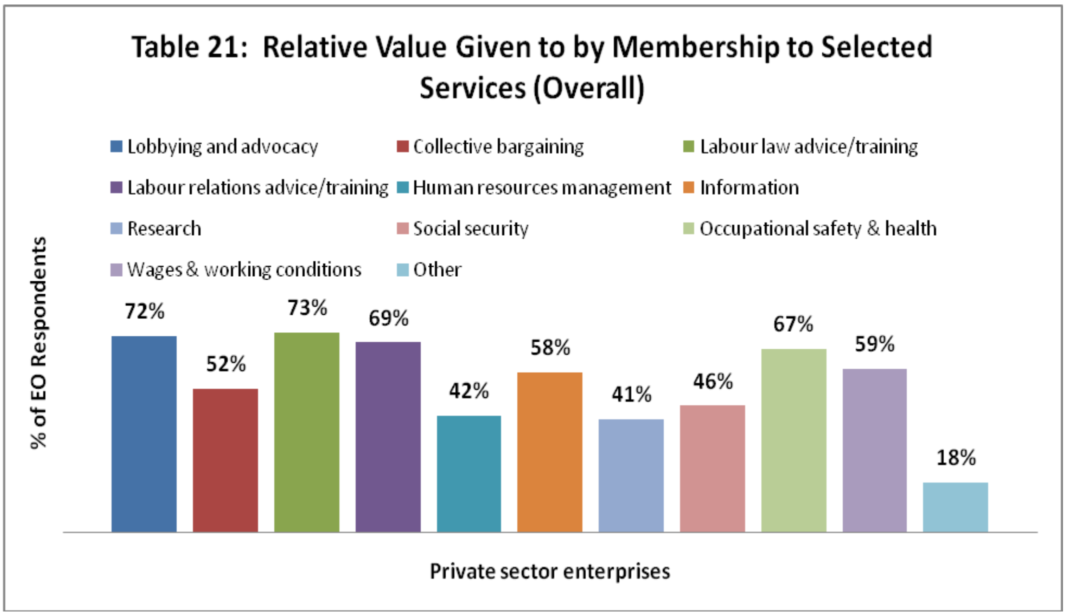


While the chart above provides some interesting information on which services are projected to experience increased demand in the next 5 years, what is perhaps most noteworthy is the level of continual demand for training.

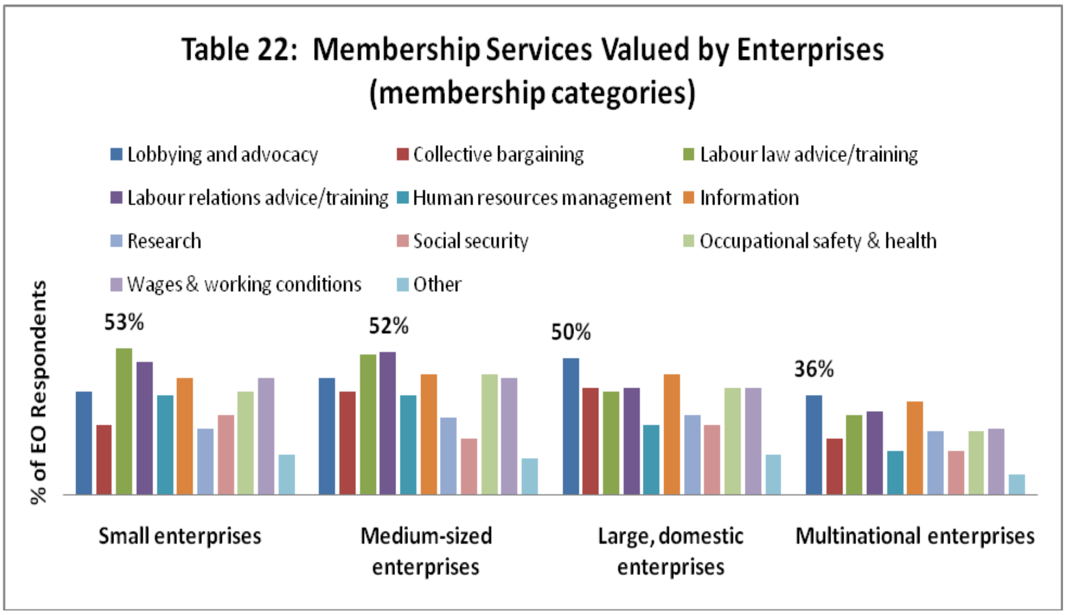
The reason this is worth noting is because in the next section (Section 5) when asked where employers' organizations are facing the most significant levels of competition (Table 28), training institutions came in ranked as the second most significant competitor to employers' organizations for service. As training as a direct service is not a core function for most national level employers' organizations, instead of regarding training intuitions as competitors perhaps this is an area where partnerships could be established – especially in countries with significant skills shortages.

The Value of Services

The chart below displays the percentage of employers' organizations that responded positively for each service as being valued by private sector enterprises. Overall, while representational services such as advocacy and lobbying remain important, direct services in labour law and labour relations obtained very high scores, as did safety and health.

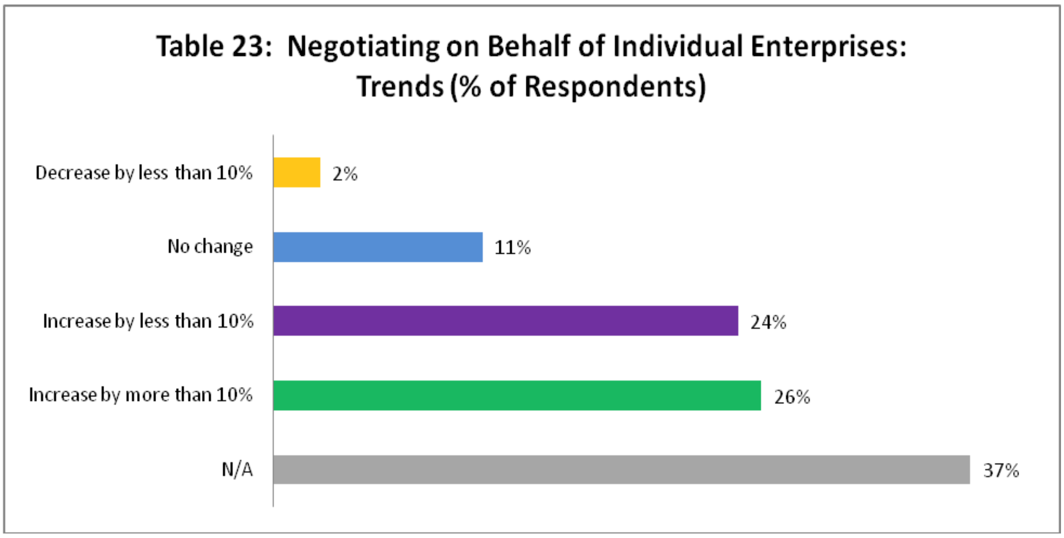


When private sector enterprises are grouped according to different categories it becomes evident that the reason labour law advice and training are so valued is owing to the level of importance small and medium sized enterprises place on these kinds of services. The chart below confirms that small and medium sized enterprises place relatively more value on direct services than large domestic and multinational enterprises, which give more importance to lobbying and advocacy. All enterprises rate information services highly, though it appears that only multinationals give research a similar value to information.

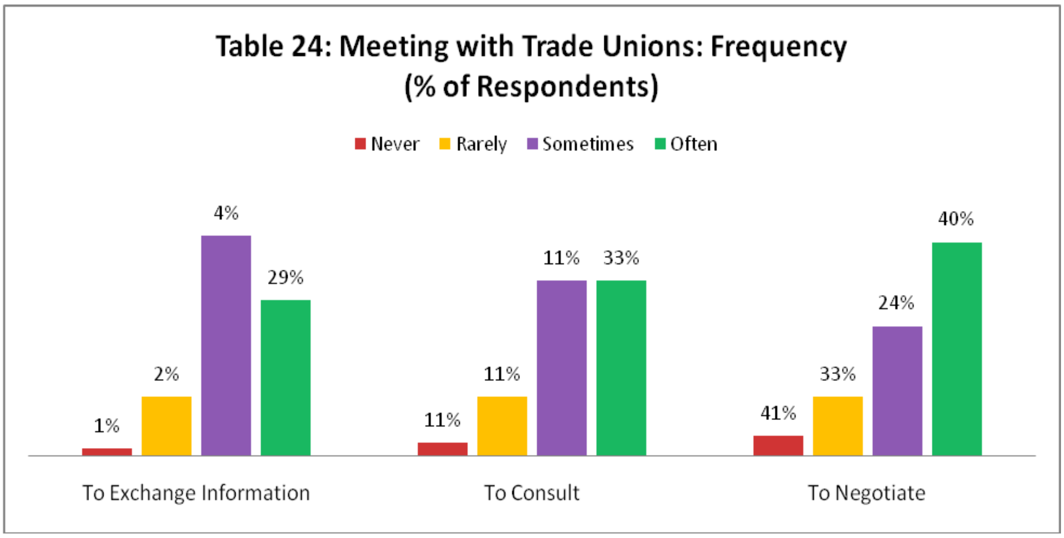


While lobbying and advocacy, labour law/labour relations advice and training and the provision of information are areas traditionally associated with employers' organizations services, it is interesting to note the relatively high score obtained by occupational safety & health.

With respect to the respondent organizations and their federation members negotiating on behalf of enterprises, a large number did not respond, implying that they did not engage in such services. However, those that did think that such services will increase in the future.



Specifically with respect to relations with trade unions, a large number of respondents indicated significant engagement, including consultations and negotiations.



A large number also expect that the influence and relevance of trade unions will increase in the next five years (Table 25):

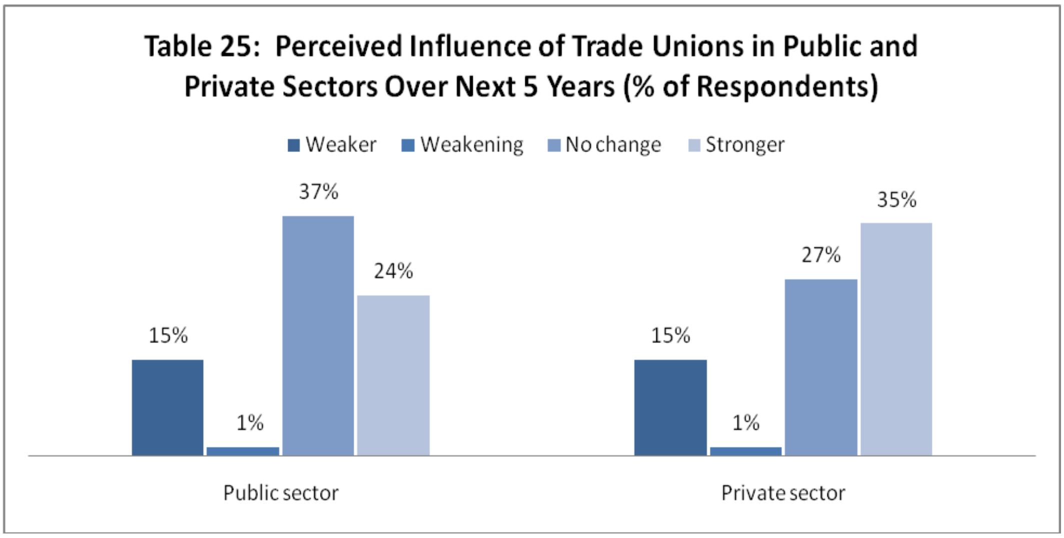
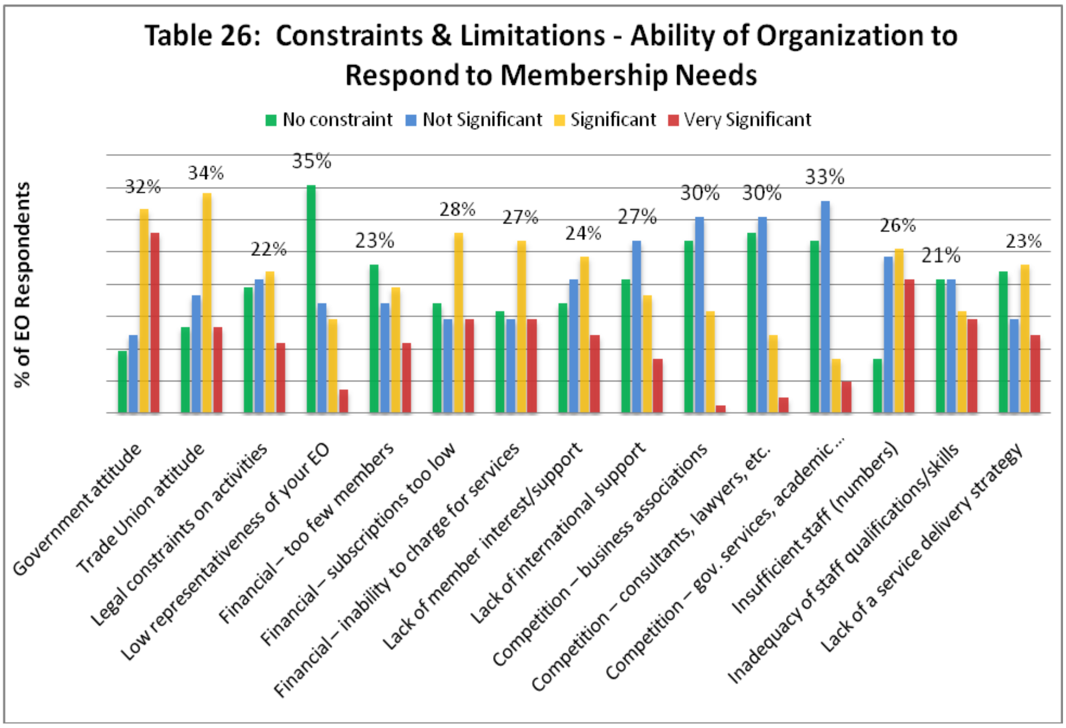


Table 25: Perceived Influence of Trade Unions in Public and Private Sectors Over Next 5 Years (% of Respondents)
Weaker
Weakening
No change
Stronger
15%
1%
37%
24%
15%
1%
27%
35%
Public sector
Private sector

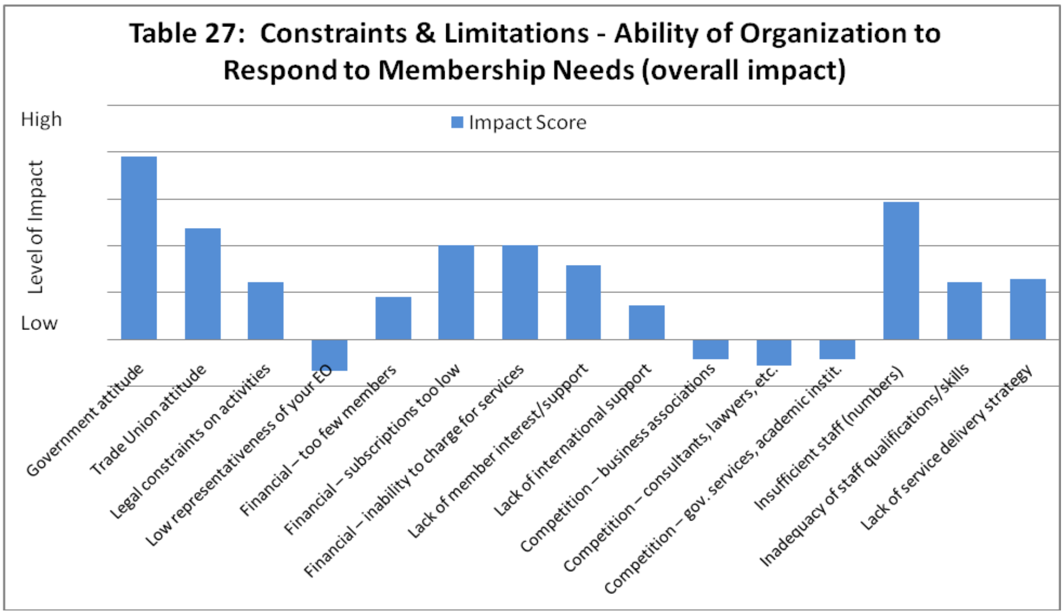
5. Opportunities & Constraints

The chart below identifies which factors act as the most significant constraints on the ability of organizations to respond to membership expectations and needs. The chart is organized according to how many EOs responded to each factor acting as a constraint or not.



The most significant external constraints, according to the responses, are government and trade union attitudes. The important internal constraints are insufficient or inadequate staff and finances.

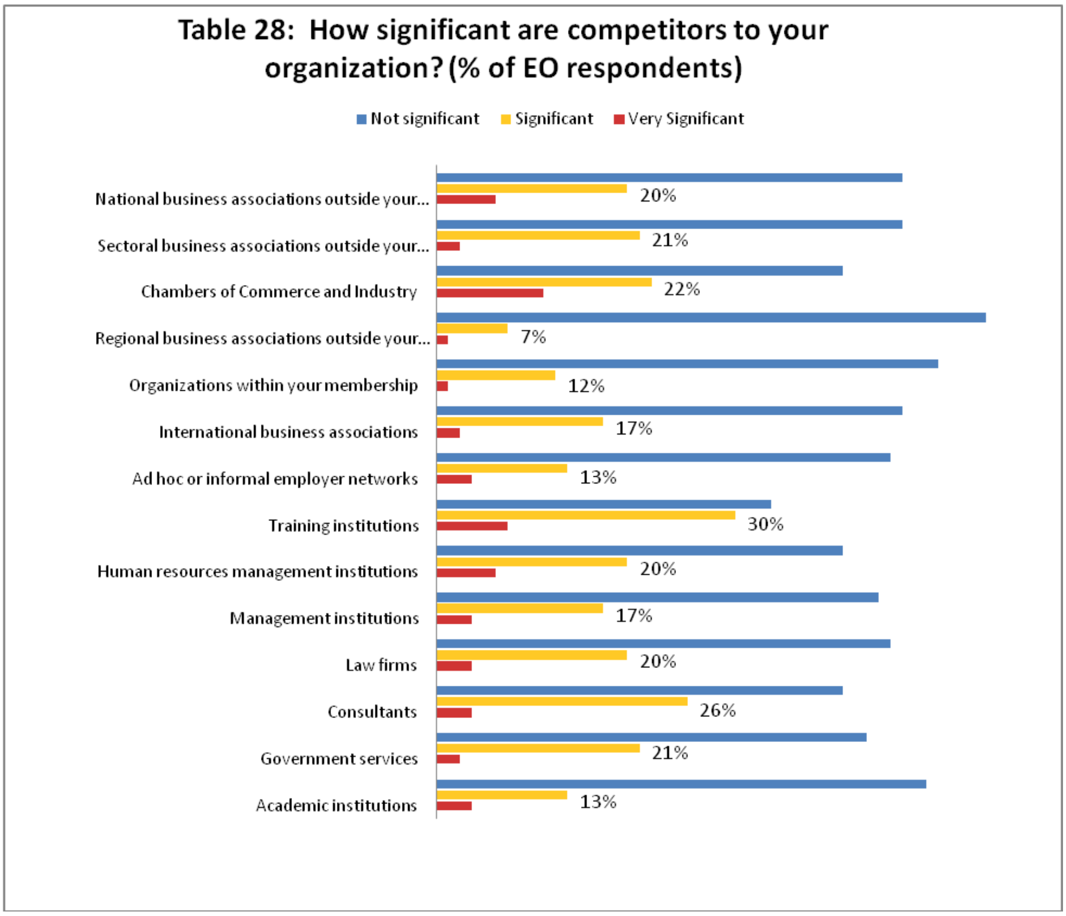
Relative to other constraints, competition from others groups does not appear to be significant. As far as potential competitors are concerned, training institutions and chambers of commerce appear to be the most significant. It should also be noted that several of the respondent organizations are chambers of commerce themselves, and hence they did not respond to that question.



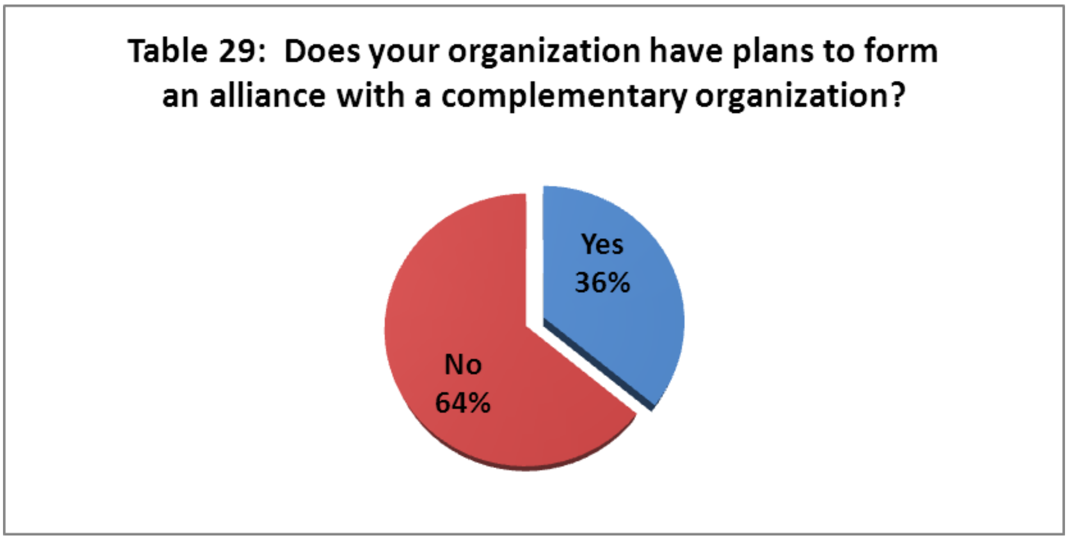
The most significant constraints for respondents, according to the aggregate impact score, are in order, government attitudes, insufficient staff (numbers) and trade union attitudes while employers' organizations responded, overwhelmingly, that low representativeness was not a constraint at all.

While low representation may not act directly as a constraint, it should be noted that in many ways, increasing representation could serve as part of a solution to overcoming the top 3 constraints: higher representation usually means more members, more revenue and more influence – all significant factors in dealing with the constraints listed by employers' organizations as most significant.

The next question employers' organizations were asked in relation to constraints was concerning the significance of different competitors to their organization. Please note that this is the chart that is referenced on page 16 in the comment on forming potential partnerships with training institutions as a part of a shared effort towards developing a more capable workforce.



It is interesting to note that in relation to potential competitors, 36% responding that they were planning to enter into alliances with complementary organizations:



It turns out that this trend of forming partnerships and alliances is in keeping with the growing trend of establishing much more complementary relationships with organizations outside the employers' organizations membership structure. The information provided on the chart below (Table 30) indicates that more alliances are a definite possibility in the near future, as more organizations work together to on common issues.

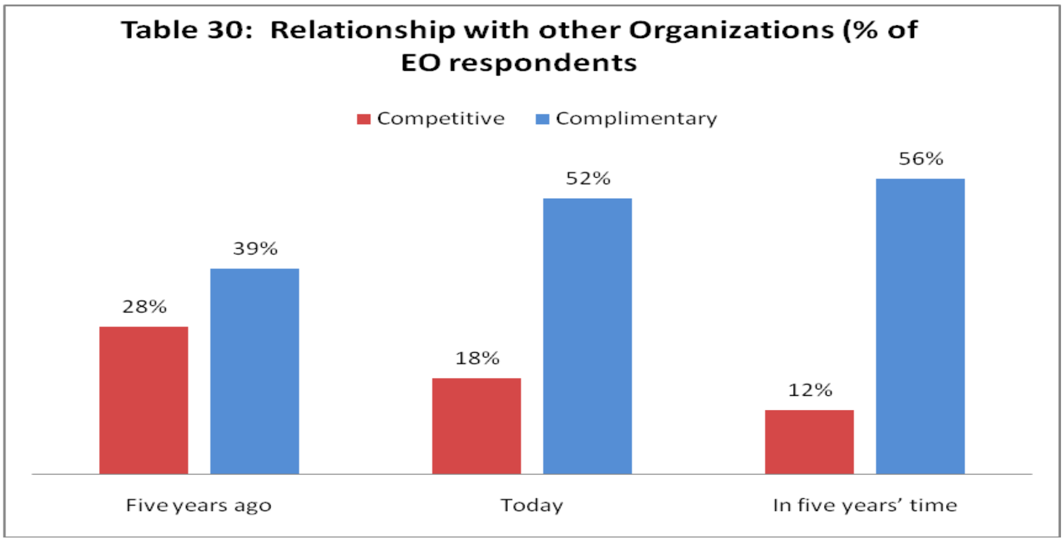
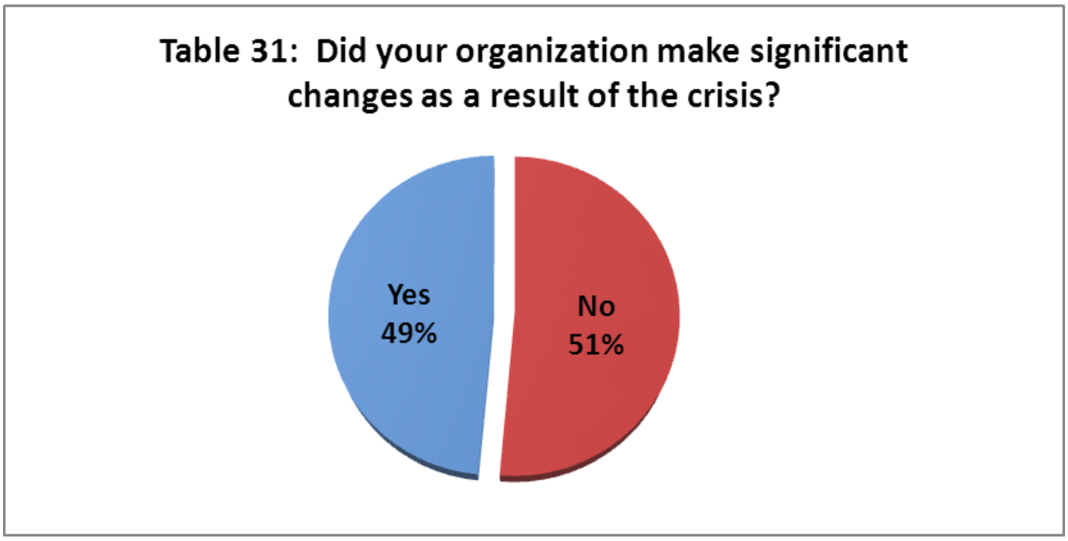


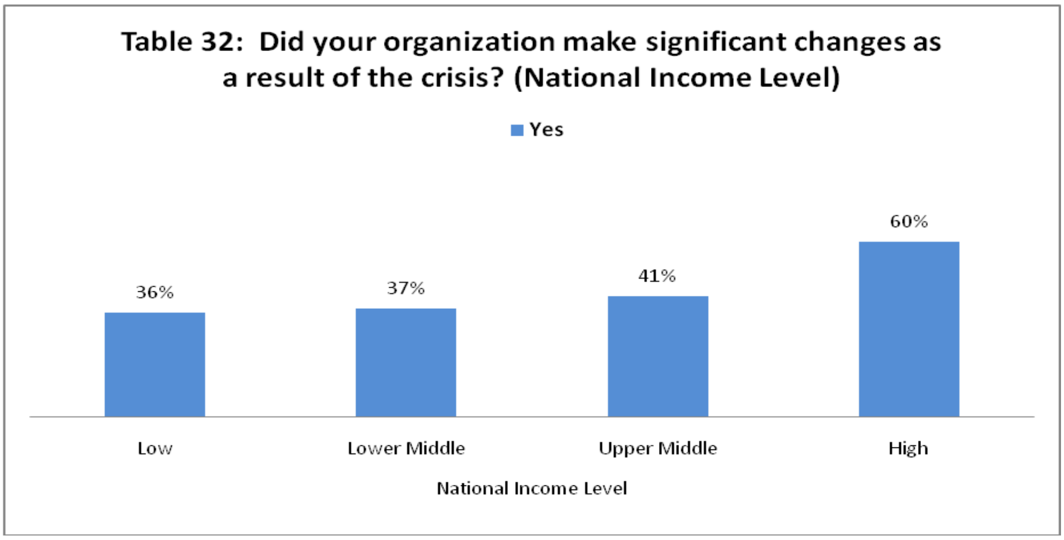
Table 30: Relationship with other Organizations (% of EO respondents
Competitive
Complimentary
28%
39%
18%
52%
12%
56%
Five years ago
Today
In five years' time

6. *Effects of the 2008 Global Financial Crisis*

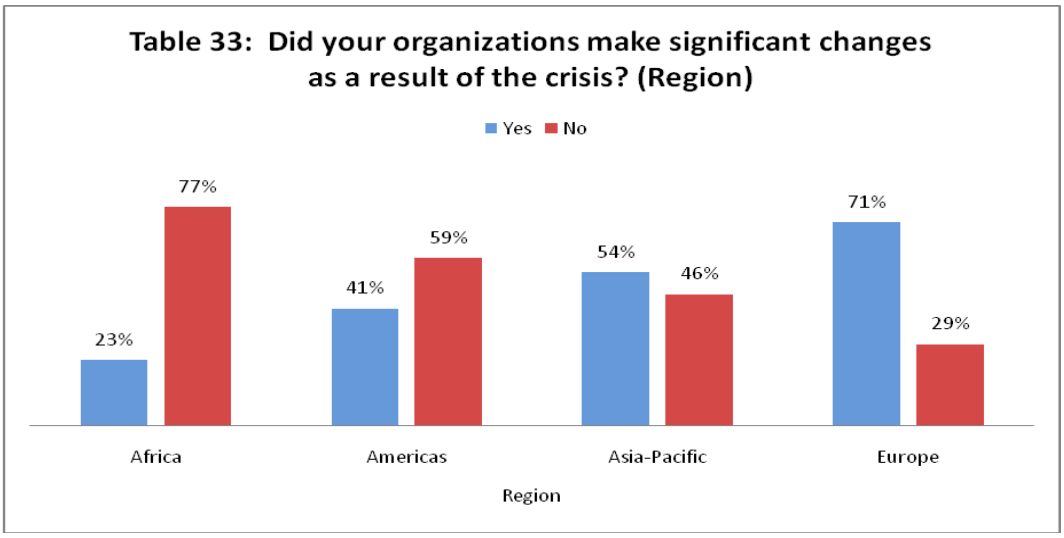
The global financial crisis that began in 2008 had a significant impact across the globe, and in many cases that impact is still felt today. The survey asked employers' organizations whether or not the crisis led to significant changes in the activities and priorities of their organization. Surprising, the response came back split nearly right down the middle.



To understand how the global response came back so balanced it helps to take a look at where those answers were coming from. The chart below shows that when the data on organizations making changes in response to the crisis is grouped according to national income level, it is evident that employers' organizations in high-income countries felt the most significant impact.



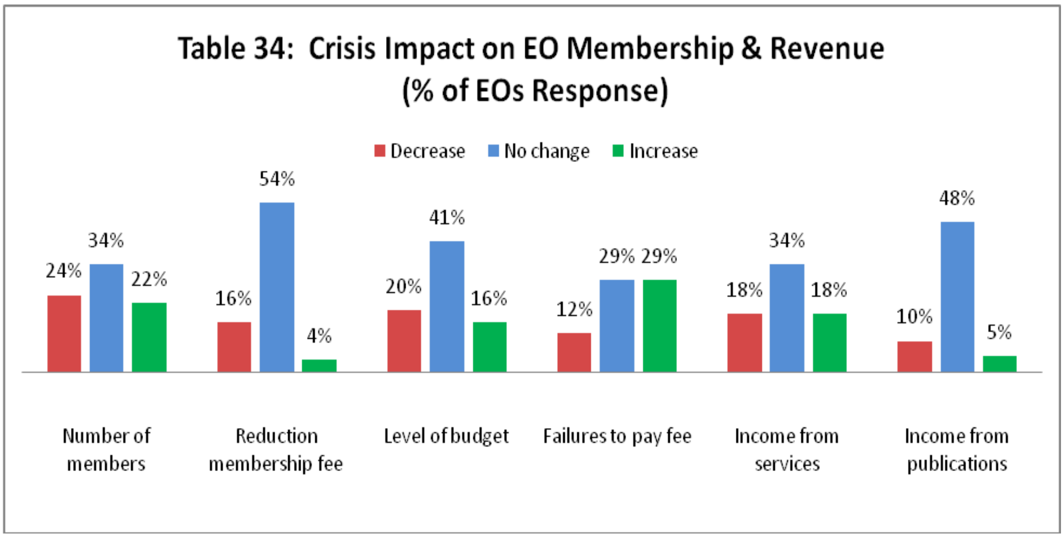
From a regional perspective (Table 33), Europe reported the highest number of crisis-triggered changes to activities and priorities, and Africa the least. (Note: North America was not part of the sample).



One very intriguing element of the responses that came back from those organizations that answered "yes" to changing their activities and priorities is that many organizations responded to the crisis with an increased effort to get closer to their members. Many organizations reported that they began to prioritize communication with their members along with intensified negotiation with trade unions and governments, so in some ways, the crisis encouraged EOs to elevate their level of service, which could help explain some of the positive data in the chart below (Table 34).

Organizations were also asked about the impact of the crisis with respect to membership and revenue. It is interesting to note in the responses to this question that when it came to Number of Members, almost as many EOs reported an increase in membership as did those that reported a decrease. This proves that while many organizations may leave a business membership organization during crisis, perhaps to cut costs, just as many are looking for leadership to help guide their business through difficult economic periods.

The chart below shows that while in many cases membership and revenue levels decreased for many EOs during the crisis, many still saw increases in certain areas, giving further evidence to the value EOs can offer their members.



Conclusion

Returning to the four fundamental questions asked in the introduction to this report:

On the current value proposition of national representative business membership organizations:

In the view of respondents, their membership values them just as strongly as ever, with demand for core services showing a consistent increase over the last 5 years and projections of continual increase into the next 5 years.

On the response of organizations to changing environments and demands from membership:

There does appear to have been changes in the way staff time has been allocated away from management and administration towards the provision of services, but the majority of responses indicated very little change. On the other hand the majority of respondents also expect increases in demand for both direct and representative services, and this awareness may well result in adaptation to meet member expectations.

On the question of what kinds of organizations business needs in the coming years:

While this question would have been better served by a survey of enterprise needs, this survey showed that business membership organizations are experiencing different levels of demand for their various services depending on their particular situations. They would be well advised to constantly monitor trends in enterprise needs as part of a strategic approach to the delivery of membership services.

On what needs to change in terms of vision and approach:

Every other source of information indicates that the world is changing for business, yet the clear majority of responses to this survey appear to indicate that very little is changing for representative business organizations. Intuitively, this implies that business organizations should perhaps look more closely at what is happening to their membership, and take a more strategic approach to sustain their value propositions. As indicated in the introduction, this was a survey of incumbents, restricted to one particular segment of business representation, and could not account for the great variety of circumstances in which representative business organizations operate. Further inquiries and studies are required to complement this survey in order to get a fuller picture of what is happening and what needs to be done it. Our project will therefore continue in those directions.

The Bureau for Employers' Activities:

ILO Survey of Employers' Organizations

2010

Annex I: Survey

1. *Membership & Structure*

1. How many direct enterprise members do you have in the following categories?

Please fill all those categories in which you have members, and leave the others blank.

Private sector enterprises (all): ___

Foreign-owned enterprises: ___

Small enterprises: ___

Public sector enterprises: ___

Public authorities1: ___

Autonomous bodies/institutions: ___

Other: ___

2. If other, please specify: ______________

3. How many associations/federations of employers do you have in your membership?

Regional/district associations: ___

Sectoral/industrial associations: ___

Other (please specify): ___

4. How many enterprises do they represent?

Regional/district associations: ___

Sectoral/industrial associations: ___

Other: ___

5. Are there any major categories of business that are not within your membership?

☐ Yes

☐ No

[1] *"Public authorities" includes local authorities, government agencies and departments, statutory bodies, public-private partnerships, and similar institutions that have a governance system independent of government.*

6. **If ‘yes’, please indicate whether they belong to other representative organizations at either the national or sub-national levels.**

Please check only those that apply.

	National	Regional	Sectoral
Private sector enterprises	☐	☐	☐
Foreign-owned enterprises	☐	☐	☐
Small enterprises	☐	☐	☐
Public sector enterprises	☐	☐	☐
Public authorities	☐	☐	☐
Autonomous bodies/institutions	☐	☐	☐
Other	☐	☐	☐

7. **What percentage of national GDP does your membership, including that of affiliated federations/associations represent approximately?**

(Please check the appropriate box)

☐ 0 - 10%
☐ 11 - 20%
☐ 21 - 30%
☐ 31 - 40%
☐ 41 - 50%
☐ 51 - 60%
☐ 61 - 70%
☐ 71 - 80%
☐ 81 - 90%
☐ 91 - 100%

8. **What percentage of national GDP does your membership, including that of affiliated federations/associations represent approximately?**

   (Please check the appropriate box)

   - ☐ 0 - 10%
   - ☐ 11 - 20%
   - ☐ 21 - 30%
   - ☐ 31 - 40%
   - ☐ 41 - 50%
   - ☐ 51 - 60%
   - ☐ 61 - 70%
   - ☐ 71 - 80%
   - ☐ 81 - 90%
   - ☐ 91 - 100%

9. **What percentage of national employment does your membership, including that of affiliated federations/associations represent approximately?**

   (Please check the appropriate box)

   - ☐ 0 - 10%
   - ☐ 11 - 20%
   - ☐ 21 - 30%
   - ☐ 31 - 40%
   - ☐ 41 - 50%
   - ☐ 51 - 60%
   - ☐ 61 - 70%
   - ☐ 71 - 80%
   - ☐ 81 - 90%
   - ☐ 91 - 100%

10. **If small, medium and large enterprises are defined by numbers of employees in your country, please provide the numbers so defined in the table below.**

    If there are several such definitions, please indicate those that apply in the case of labour or employment law. If there is no such definition for any category, please leave the appropriate space blank.

    Small: ___

    Medium: ___

    Large: ___

11. **If you have private or public sector enterprises in your direct membership, what proportion of them (numbers of enterprises) are small, medium or large?**

If there are no definitions of small, medium or large enterprises by numbers of employees in your country, please define 'small' as below 50, 'medium ' as 50-200, and 'large' as 200+)

Private Small: ___

Public Small: ___

Private Medium: ___

Public Medium: ___

Private Large: ___

Public Large: ___

12. If you have associations/federations in membership, what proportions of enterprises in their membership are small, medium or large (according to the same definitions as in the previous question)?

Private Small: ___

Public Small: ___

Private Medium: ___

Public Medium: ___

Private Large: ___

Public Large: ___

13. Has membership changed in the last five years with respect to each of the following categories of members (both direct and through member associations)?

Please leave blank if you do not have membership in a particular category

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Private sector enterprises (overall)	☐	☐	☐	☐	☐
Small enterprises	☐	☐	☐	☐	☐
Medium -sized enterprises	☐	☐	☐	☐	☐
Large enterprises (domestic)	☐	☐	☐	☐	☐
Multinational enterprises	☐	☐	☐	☐	☐
Public sector enterprises	☐	☐	☐	☐	☐
Public authorities	☐	☐	☐	☐	☐
Autonomous bodies/institutions	☐	☐	☐	☐	☐
Regional/district associations	☐	☐	☐	☐	☐
Sectoral/industrial associations	☐	☐	☐	☐	☐
Self-employed individuals	☐	☐	☐	☐	☐

14. In the experience of your organization and its affiliates, what kinds of labour related services do different categories of enterprises value most?

Please check the appropriate service for each category, and leave blank those categories that are not in membership

	Lobbying and Advocacy	Collective bargaining	Labour Law Advice/ Training	Labour Relations Advice/Training	Human Resources Management	Information
Private sector enterprises (overall)	☐	☐	☐	☐	☐	☐
Small enterprises	☐	☐	☐	☐	☐	☐
Medium -sized enterprises	☐	☐	☐	☐	☐	☐
Large enterprises (domestic)	☐	☐	☐	☐	☐	☐
Multinational enterprises	☐	☐	☐	☐	☐	☐
Public sector enterprises	☐	☐	☐	☐	☐	☐
Public authorities	☐	☐	☐	☐	☐	☐
Autonomous bodies/ institutions	☐	☐	☐	☐	☐	☐
Regional/district associations	☐	☐	☐	☐	☐	☐
Sectoral/industria l associations	☐	☐	☐	☐	☐	☐
Self-employed individuals	☐	☐	☐	☐	☐	☐

(Cont.)	Research	Social Security	Occupation Health & Safety	Wages and Working Conditions	Other
Private sector enterprises (overall)	☐	☐	☐	☐	☐
Small enterprises	☐	☐	☐	☐	☐
Medium -sized enterprises	☐	☐	☐	☐	☐
Large enterprises (domestic)	☐	☐	☐	☐	☐
Multinational enterprises	☐	☐	☐	☐	☐
Public sector enterprises	☐	☐	☐	☐	☐
Public authorities	☐	☐	☐	☐	☐
Autonomous bodies/institutions	☐	☐	☐	☐	☐
Regional/district associations	☐	☐	☐	☐	☐
Sectoral/industrial associations	☐	☐	☐	☐	☐
Self-employed individuals	☐	☐	☐	☐	☐

2. Revenue

15. What was the total income of your organization in 2009 (US$)

____

16. What percentage of your revenue did you get from the following sources in 2009?

Total must = 100. Enter numbers only

Membership subscriptions: ______

Fees for services to members: ______

Fees for services to non-members: ______

Sales of publications: ______

Public funds (including donors): ______

Other private funds (foundations, trusts, legacies, donations): ______

Other: ______

17. If other, please specify

____

18. Has your revenue from the following sources changed over the last 5 years?

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Membership subscription	☐	☐	☐	☐	☐
Fees for services to members	☐	☐	☐	☐	☐
Fees for services to non-members	☐	☐	☐	☐	☐
Sales of publications	☐	☐	☐	☐	☐
Public funds (including donors)	☐	☐	☐	☐	☐
Other private funds (foundations, trusts, legacies, donations)	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

Comments: _______________

19. Do you expect revenue from the following sources to change over the next 5 years?

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Membership subscription	☐	☐	☐	☐	☐
Fees for services to members	☐	☐	☐	☐	☐
Fees for services to non-members	☐	☐	☐	☐	☐
Sales of publications	☐	☐	☐	☐	☐
Public funds (including donors)	☐	☐	☐	☐	☐
Other private funds (foundations, trusts, legacies, donations)	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other please specify: _______________

20. If you expect revenue from any source to increase or decrease in the next five years, please provide the most important reasons why:

Membership subscriptions: ______

Fees for services to members: ______

Fees for services to non-members: ______

Sales of publications: ______

Public funds (including donors): ______

Other private funds (foundations, trusts, legacies, donations): ______

Other (please specify): ______

3. Staff

21. How many persons do you have on your staff in Management, Professional and Support (secretaries, clerks, etc.)?

Permanent management: ______

Permanent support: ______

Part-time management: ______

Part-time support: ______

Temporary/consultants in the past year in management: ______

Temporary/consultants in the past year in support: ______

22. Please indicate the approximate percentage of time your staff and consultants spent in 2005/spend in 2010 in the following areas of work:

Legal issues 2005: ______

Legal issues 2010: ______

Economic issues 2005: ______

Economic issues 2010: ______

Industrial/labour relations 2005: ______

Industrial/labour relations 2010: ______

Marketing/member relations 2005: ______

Marketing/member relations 2010: ______

International affairs 2005: ______

International affairs 2010: ______

Communication/public relations 2005: ______

Communication/public relations 2010: ______

Management & Administration 2005 : ______

Management & Administration 2010: ______

Other: ______

23. When did the last major staff restructuring take place in your organization?

- ☐ 1 –3 years ago
- ☐ 3-5 years ago
- ☐ More than 5 years ago
- ☐ Never

24. Does your organization have a strategic plan?

- ☐ Yes
- ☐ No

25. If you answered 'yes', Please indicate how fully it has been implemented:

- ☐ Not at all
- ☐ Only partly
- ☐ Mostly
- ☐ Fully

26. If you answered 'yes', Please indicate how often your strategic plan is formally reviewed:

- ☐ Not at all
- ☐ Not planned yet
- ☐ Ad hoc, as necessary
- ☐ Regularly

4. Mandate & Services

27. Have your representative services (lobbying, advocacy) in the following policy areas increased or decreased over the last 5 years?

Please fill only those that apply - it will be assumed that those left blank are areas in which you do not work

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Employment, labour and social affairs	☐	☐	☐	☐	☐
Economy	☐	☐	☐	☐	☐
Investment and trade	☐	☐	☐	☐	☐
Education and skills	☐	☐	☐	☐	☐
Environment	☐	☐	☐	☐	☐
Social security/social protection	☐	☐	☐	☐	☐
International affairs	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other (please specify): _____

28. If you have indicated increases or decreases with respect to any of the policy areas, please provide the reason that led to each of them:

____

29. Do you expect your representative services (lobbying, advocacy) in the following policy areas to increase or decrease over the next 5 years?

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Employment, labour and social affairs	☐	☐	☐	☐	☐
Economy	☐	☐	☐	☐	☐
Investment and trade	☐	☐	☐	☐	☐
Education and skills	☐	☐	☐	☐	☐
Environment	☐	☐	☐	☐	☐
Social security/social protection	☐	☐	☐	☐	☐
International affairs	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other (please specify): _____

30. If you expect increases or decreases with respect to any of the policy areas, please provide the reason why:

____

31. In the policy areas covered by this section, do formal consultations or discussion mechanisms or institutions exist to deliver business views to government?

	Yes	No
Employment, labour and social affairs	☐	☐
Economy	☐	☐
Investment and trade	☐	☐
Education and skills	☐	☐
Environment	☐	☐
Social security/social protection	☐	☐
International affairs	☐	☐
Other	☐	☐

32. In which of the mechanisms does your organization participate?

	Yes	No
Employment, labour and social affairs	☐	☐
Economy	☐	☐
Investment and trade	☐	☐
Education and skills	☐	☐
Environment	☐	☐
Social security/social protection	☐	☐
International affairs	☐	☐
Other	☐	☐

5. Labour Market Services

33. With respect to labour market matters, has your organization's lobbying and advocacy activity changed over the past 5 years?

- ☐ Decrease by more than 10%
- ☐ Decrease by less than 10%
- ☐ No change
- ☐ Increase by less than 10%
- ☐ Increase by more than 10%

34. And how do you anticipate it to change over the next 5 years?

- ☐ Decrease by more than 10%
- ☐ Decrease by less than 10%
- ☐ No change
- ☐ Increase by less than 10%
- ☐ Increase by more than 10%

35. If you or your association/federation members engage in negotiations on behalf of enterprises, what trend do you observe in this activity?

If you and your association/federation members do not engage in such activity please go to the next question, leave this question blank

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Trend in Activity	☐	☐	☐	☐	☐

36. Has the level of direct services to enterprises provided by your organization or associative bodies within your membership in the following employment-related areas changed over the last five years?

Leave blank those that do not apply

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Collective bargaining	☐	☐	☐	☐	☐
Minimum wages	☐	☐	☐	☐	☐
Dispute resolution	☐	☐	☐	☐	☐
Employee relations advice Representation in courts/tribunals	☐	☐	☐	☐	☐
Member networking	☐	☐	☐	☐	☐
Identification and sharing best practice	☐	☐	☐	☐	☐
Benchmarking	☐	☐	☐	☐	☐
Provision of information Research	☐	☐	☐	☐	☐
Publications	☐	☐	☐	☐	☐
Provision of advice	☐	☐	☐	☐	☐
Consultancy	☐	☐	☐	☐	☐
Training	☐	☐	☐	☐	☐
Recruitment services for members	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other (please specify): ______

37. Do you expect the demand for direct services to enterprises provided by your organization or associative bodies within your membership in the following employment-related areas to change over the next five years?

Leave blank those that do not apply

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Collective bargaining	☐	☐	☐	☐	☐
Minimum wages	☐	☐	☐	☐	☐
Dispute resolution	☐	☐	☐	☐	☐
Employee relations advice Representation in courts/tribunals	☐	☐	☐	☐	☐
Member networking	☐	☐	☐	☐	☐
Identification and sharing best practice	☐	☐	☐	☐	☐
Benchmarking	☐	☐	☐	☐	☐
Provision of information Research	☐	☐	☐	☐	☐
Publications	☐	☐	☐	☐	☐
Provision of advice	☐	☐	☐	☐	☐
Consultancy	☐	☐	☐	☐	☐
Training	☐	☐	☐	☐	☐
Recruitment services for members	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other (please specify): _____

6. Opportunities and Constraints

38. To what extent do the following factors act as constraints/limiting factors on the ability of your organization to respond to membership expectations and needs?

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
Government attitude	☐	☐	☐	☐	☐
Trade Union attitude	☐	☐	☐	☐	☐
Legal constraints on activities	☐	☐	☐	☐	☐
Low representativeness of your business association Financial - too few members	☐	☐	☐	☐	☐
Financial - subscriptions too low	☐	☐	☐	☐	☐
Financial - inability to charge for services	☐	☐	☐	☐	☐
Lack of member interest/support	☐	☐	☐	☐	☐
Lack of international support	☐	☐	☐	☐	☐
Competition from others - business associations Competition from others - consultants, lawyers, etc. Competition from others - government services, academic institutes	☐	☐	☐	☐	☐
Insufficient staff (numbers)	☐	☐	☐	☐	☐
Inadequacy of staff qualifications/skills	☐	☐	☐	☐	☐
Lack of a service development and delivery strategy	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other (please specify): ______

39. How significant are the following competitors to your organization?

Tick as many as appropriate

	Not Significant	Significant	Very Significant
National business associations outside your membership	☐	☐	☐
Sectoral business associations outside your membership	☐	☐	☐
Chambers of Commerce and Industry	☐	☐	☐
Regional business associations outside your membership	☐	☐	☐
Organizations within your membership	☐	☐	☐
International business associations	☐	☐	☐
Ad hoc or informal employer networks	☐	☐	☐
Training institutions	☐	☐	☐
Human resources management institutions	☐	☐	☐
Management institutions	☐	☐	☐
Law firms	☐	☐	☐
Consultants	☐	☐	☐
Government services	☐	☐	☐
Academic institutions	☐	☐	☐
Other	☐	☐	☐

If other (please specify): ______

40. Is competition from these sources an increasing or decreasing concern for your organization?

Please tick as appropriate, leaving blank those that are not relevant

	Decrease by more 10%	Decrease by less than 10%	No change	Increase by less than	Increase by more
National business associations outside your membership	☐	☐	☐	☐	☐
Sectoral business associations outside your membership	☐	☐	☐	☐	☐
Chambers of Commerce and Industry	☐	☐	☐	☐	☐
Regional business associations outside your membership	☐	☐	☐	☐	☐
Organizations within your membership	☐	☐	☐	☐	☐
International business associations	☐	☐	☐	☐	☐
Ad hoc or informal employer networks	☐	☐	☐	☐	☐
Training institutions	☐	☐	☐	☐	☐
Human resources management institutions	☐	☐	☐	☐	☐
Management institutions	☐	☐	☐	☐	☐
Law firms	☐	☐	☐	☐	☐
Consultants	☐	☐	☐	☐	☐
Government services	☐	☐	☐	☐	☐
Academic institutions	☐	☐	☐	☐	☐
Other	☐	☐	☐	☐	☐

If other (please specify): ______

41. Do you currently plan to merge with either a competing or complementary organization?

- ☐ Yes – with a competing organization
- ☐ Yes – with a complementary organization
- ☐ No

42. Do you currently plan to develop an alliance with either a competing or complementary organization?

- ☐ Yes – with a competing organization
- ☐ Yes – with a complementary organization
- ☐ No

43. If you answered 'yes' to either or both of the previous questions what kind of organization is it?

____

44. Where other organizations outside of your membership structure exist, how would you describe your relationship with them?

Please choose between competitive and complementary for each time segment

	Competitive	Complementary
5 years ago	☐	☐
Today	☐	☐
In 5 year	☐	☐

45. Where other organizations outside of your membership structure exist, how would you describe your respective roles?

Please choose between well-defined demarcation and overlapping for each time segment

	Well defined demarcation of responsibilities	Overlapping responsibilities/services
5 years ago	☐	☐
Today	☐	☐
In 5 year	☐	☐

46. How do you see the influence and relevance of trade unions in your country evolving over the next five years in the public and private sectors?

Please check the appropriate response for each sector

	Weaker	No change	Stronger
In the private sector	☐	☐	☐
In the public sector	☐	☐	☐

47. How often does your organization meet with trade unions?

Please check the appropriate box for each kind of meeting

	Never	Rarely	Sometimes	Often
To exchange information	☐	☐	☐	☐
To consult	☐	☐	☐	☐
To negotiate	☐	☐	☐	☐

8. *Effect of the 2088 Financial Crisis*

48. Did the crisis that began in 2008 lead to significant changes in the activities and priorities of your organization?

☐ Yes
☐ No

If you answered 'Yes', please describe the changes

____

49. Has there been any impact on your organization with respect to membership and revenue in the past year that you attribute to the crisis?

	Decrease	No Change	Increase
Number of Members	☐	☐	☐
Reduction of membership	☐	☐	☐
Level of budget	☐	☐	☐
Failures to pay fee	☐	☐	☐
Income from services	☐	☐	☐
Income from publications	☐	☐	☐

9. *Additional Comments*

Please use this space to provide further information or to comment on issues not already covered in the questionnaire with a view to helping us to better understand the role and prospects of your organization as the voice of business in your country.

50. Comments:

____

The Bureau for Employers' Activities:

ILO Survey of Employers' Organizations

2010

Annex II: List of Survey Respondents

Africa

Benin	Conseil National du Patronat du Benin (CNP)
Botswana	Botswana Confederation of Commerce Industry & Manpower (BOCCIM)
Cameroon	
Ethiopia	Ethiopian Employers' Federation
Ghana	Ghana Employers Association
Lesotho	Association of Lesotho employers and Business
Malawi	Employers Consultative Association of Malawi
Mali	National Council of Employees
Mauritius	Mauritius Employers' Federation
Namibia	Namibian Employers Federation
Senegal	Conseil National du Patronat du Senegal (CNP)
South Africa	Business Unity South Africa
Swaziland	The Federation of Swaziland Employers & Chamber of Commerce (FSE&CC)
Tanzania	Association of Tanzanian Employers (ATE)
Zimbabwe	Employers' confederation of Zimbabwe (EMCOZ)

Americas

Argentina	Unión Industrial Argentina
Bolivia	Confederación de Empresarios Privados de Bolivia
Brazil	Confederçáo Nacional da Indústria (CNI)
Chile	Confederación de la Producción y del Comercio
Colombia	Asociación Nacional de Empresarios de Colombia (ANDI)
Costa Rica	Unión Costarricense de Cámaras y Asociaciones del Sector Empresarial Privado (UCCAEP)
Dominican Republic	Confederación Patronal de la República Dominicana (COPARDOM)
Ecuador	Cámara de Industrias de Guayaquil
El Salvador	Asociación Nacional de la Empresa Privada
Guatemala	Comité Coordinador de Asociaciones Agrícolas, Comerciales, Industriales y Financieras (CAFIC)
Guyana	The Consultative Association of Guyanese Industry
Honduras	Consejo Hondureño de la Empresa Privada (COHEP)

Mexico	Confederación de Cámaras Industriales de los Estados Unidos Mexicanos
Nicaragua	Consejo Superior de la Empresa Privada (COSEP)
Panama	Consejo Nacional De La Empresa Privada-(CONEP)
Peru	Confederación Nacional de Instituciones Empresariales Privadas (CONFIEP)
St. Lucia	St. Lucia Employers' Federation
Surinam	Suriname Trade and Industry Association
Uruguay	Cámara de Industrias del Uruguay
Venezuela	Federación de Cámaras y Asociaciones de Comercio y Producción (FEDECAMARAS)

Asia-Pacific

Australia	Australian Chamber of Commerce and Industry
Bangladesh	
Cambodia	Cambodian Federation of Employers and Business Associations (CAMFEBA)
China	China Enterprise Confederation
Fiji	Fiji Employers Federation
India	The Employers Federation of India
Indonesia	Employers' Association of Indonesia (APINDO)
Iran	Iranian Confederation of Employers Associates
Japan	Japan Business Federation (Nippon Keidanren)
Kiribati	Kiribati Chanber of Commerce & Industry
Laos	Lao National Chamber of Commerce and Industry
Malaysia	Malaysian Employers Federation
Mongolia	Mongolian Employers' Federation
New Zealand	Business New Zealand
Pakistan	Employers' Federation of Pakistan
Papua New Guinea	Employers Federation
Philippines	Employers Confederation of the Philippines
Singapore	Singapore National Employers Federation
South Korea	Korea Employers Federation
Sri Lanka	The Employers' Federation of Ceylon
Thailand	Employers' Confederation of Thailand
Tuvalu	Tuvalu National Private Sector Organization (TNPSO)

Vanuatu	Vanuatu Chamber of Commerce and Industry

Europe

Armenia	Republican Union of Employers of Armenia
Austria	Federation of Austrian Industries
Belarus	Business Union of Entrepreneurs and Employers
Bosnia-Herzegovina	Employers Association of Bosnia and Herzegovina
Bulgaria	Bulgarian Industrial Association - Union of Bulgarian Business
Croatia	Croatian Employers' Association (HUP)
Cyprus	Cyprus Employers & Industrialists Federation (OEB)
Czech Republic	Confederation Of Industry of the Czech Republic (SP)
Denmark	Confederation of Danish Employers (DA)
Georgia	Georgia Employers Association
Germany	Confederation of German Employers (BDA)
Ireland	Irish Business and Employers' Confederation
Kazakhstan	Confederation of Employers and enterprises of Kazakhstan (CEEK)
Kyrgyz Republic	National Confederation of Employers of the Kyrgyz Republic
FYR Macedonia	Organisation of Employers of Macedonia
Montenegro	Montenegrin Employers Federation
Netherlands	Confederation of Netherlands Industry and Employers (VNO-NCW)
Russia	Russian Union of Industrialists and Entrepreneurs (RSPP)
Serbia	Serbian Association of Employers
Spain	Confederación Española de Organizaciones Empresariales (CEOE)
Switzerland	Union Patronale Suisse (UPS)
Tajikistan	Association of Employers of the Republic of Tajikistan
Turkey	Turkish Confederation of Employer Associations (TISK)
Ukraine	Federation of Employers of Ukraine (FEU)
United Kingdom	Confederation of British Industry