

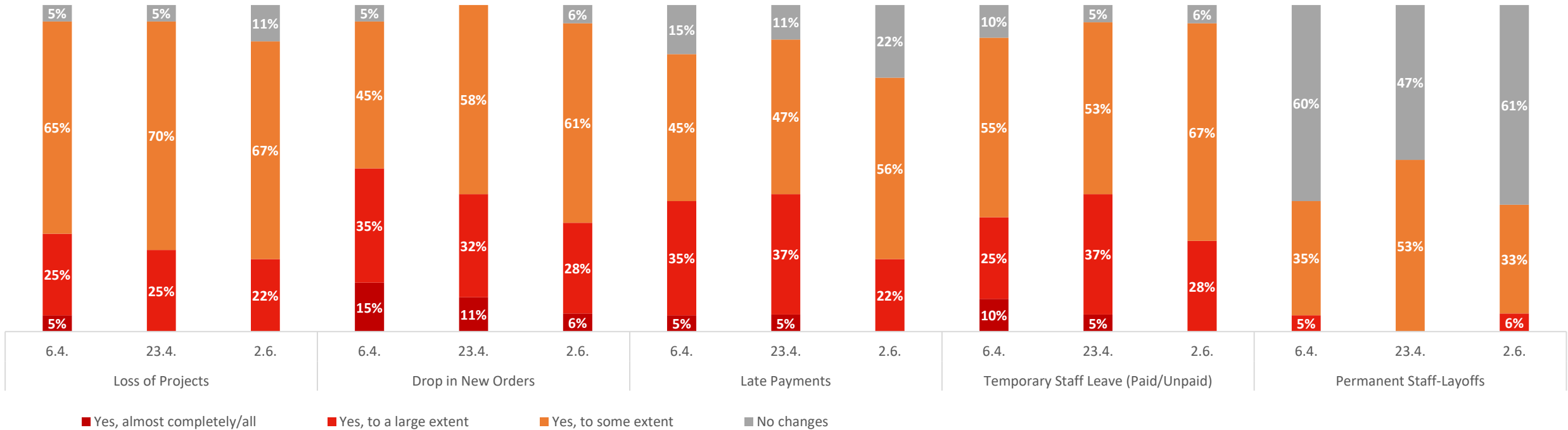
OVERVIEW

- Survey III: conducted between 27th May and 2nd June 2020
- 10 questions (8 closed, 2 open)
- 18 EFCA MAs responded (approx. 2/3rd)

Main conclusions:

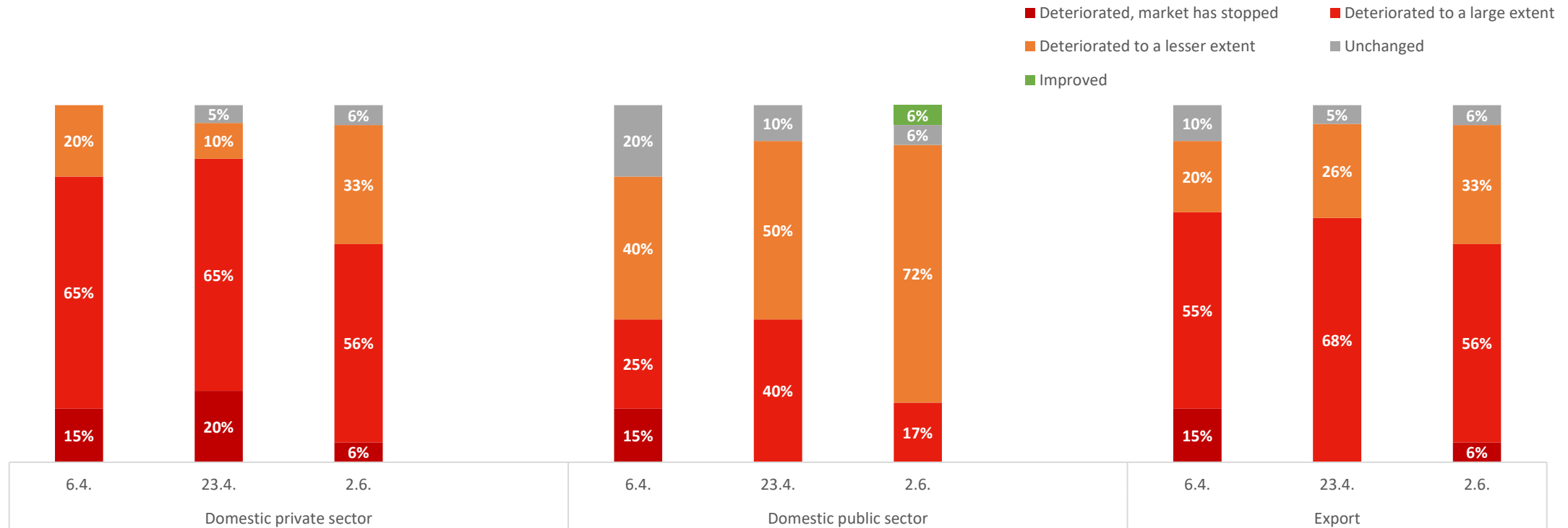
- **Staff:** Temporary leaves is still dominant across Europe. Permanent lay-offs are on the rise in the most affected countries, approximately 1/3 of the countries
- **Orders:** Drop in new projects is still significant, yet less so than in the early phases of the COVID-19 pandemic. Loss of projects is significant yet stable.
- Effects are increasingly affecting **Exports** in addition to a significant, negative impact on **Private sector** projects. **Public sector** projects are recovering, yet still below pre-pandemic levels

How are companies affected?



6.4.: n= 20; 23.4.: n= 20; 2.6.: n=18.

How have the following sectors been affected by the crisis, compared to the situation in January 2020?



6.4.: n= 20; 23.4.: n= 20; 2.6.: n=18.

What measures have been taken by the authorities in your country that have been useful and supportive to the industry and your member companies?
Please describe briefly.

SWEDEN	Paid sick leave from day one, carried from the state from day 1 rather than from day 15 as before. Furloughing (temporary lay offs) up to 80 %, partly carried by the state (50 %). Reduced social security costs on salaries for 4 months. Ability to borrow/withhold tax and social security. Some state authorities that are major clients have agreed to reduce time of payment to 14 days rather than 30. The state has done a lot of good things. Many measures have been helpful. But much more is needed. But there are industries that are suffering way more than ours.
FRANCE	"The authorities have subsidize part-time activity. This is currently decreasing, step by step. The confinement costs are considered by authorities, which try to organize a common approach in order to set up rulings that would apply nationally. The size of this acceptance is debated between the budget minister and the infrastructure minister."
BELGIUM	"- Support measures for companies affected by the coronavirus-crisis. - Implementation of temporary unemployment due to force majeure for employees of engineering firms. - Deferral of the repayment of business loans (for a max of 6 months). - New measure adjustment: the firm can choose to continue teleworking- Questions about childcare regulations are raised: schools not fully operational and businesses are restarting = planning issues. - How will the annual holiday in the sector be impacted? Our organisation has informed the several relevant ministers of the different regions about the impact of the crisis on the sector, and our will to continue working (public infrastructure projects, ...), without putting a hold on the governmental investment plans. We received positive replies from several ministers. Projects have been restarted, provided the measures are taken into account. ORI is constantly informing the members by updating the website with relevant information and be in close contact with other sector organisations and federations. A transparent and efficient flow of information is necessary. Overview: see https://www.ori.be/nl/corona/ - https://www.ori.be/fr/corona/ "
LATVIA	"For some companies who have suffered from the decrease of turnover, there are possibilities to have 3 months tax holiday (and later some negotiations about even later payment will be possible). Also if the office is in governmental or municipal buildings and the company is not using office and working from a distance , so this company can get up to 90% off the office rent costs due to special legislation, but then you can't use the office. This is valid from 13 March and will by 31 August (unless the government will not extend this support period or the company will re-start using the office)."

CZECH REPUBLIC	"1. They were ready to have dialogue about our problems and solve projects which were effected.2. Helping with the loans using state guarantees.3. Incrising infrastructure budget."
DENMARK	"Postponed payment of taxes and VAT etc. Increased public spending - particularly local governments and social housing."
NORWAY	The Norwegian government have taken some broad measures: Extra financial support to employees on furlough, reduced company taxes by 4% for four months. With the exception of extraordinary financial support to projects at the airports authority Avinor, the "crisis packages" that have been announced focus mainly on the tourism and services sector and have a limited effect on the construction sector.
UKRAINE	"The Great Construction program which provides for major repairs or construction of roads and infrastructure facilities in Ukraine for 5 years was started on March 1, 2020.This year government plans to put into operation 4,164 kilometers of roads .On April 13, 2020, the parliament reduced the funding of social infrastructure facilities by a third, but left the budget allocated for roads unchanged. In order to support and develop road industry companies, the State Agency of Roads of Ukraine has launched an online portal ""ROAD and WORK"" to search for vacancies."
ROMANIA	"Most ARIC members consider the measures taken by the Government insufficient and / or inadequate. About 50% of ARIC members have resorted to government support measures. The most appreciated and used measures were the state guarantees for loans and the extension of the payment deadlines of some fiscal obligations."
TURKEY	"SHORT WORK ALLOWANCE Payment which covers up to 60% of lost time of labor force was probably the only practical measure that our companies have benefitted during the time the firms were locked down. As home study were only effective to some extend or for those of us whose work load has reduced considerably, resulting less work to keep their staff busy during these times, this government aid was quite material. This measure had of course had a cap for salaries and mostly useful for low to mid category personnel. For high pay staff there was a net loss either to the firm if they compensated the difference or to the staff as they get less than their usual income (as the formula was 40% of their full salary from the firm and 60% of the max. cap that government set as max. salary).There were other measures that was put in force to relieve economic burdens such as delaying tax and social security payments etc., but unfortunately our sector was not included in the scope of these measures."
SWITZERLAND	Construction sites were largely excluded from Lockdown measures. Public entities follow the Policy of zero-days delay regarding payment of bills. Some are willing to compensate fully for additional Costs incurred.

GERMANY	There are regular / weekly meetings between associations and state authorities, it is discussed now to support the municipalities financially to help them maintain there investments in buildings and infrastrucure.
IRELAND	"Financial supports to pay wages provided.Guidelines on health & safety developed.SME business supports introduced."
SERBIA	"- Tax policy measures - This set of measures is related to deferral of tax payment with obligation of repayment of deferred taxes in instalments, not earlier than beginning of fiscal year 2021. - Measures of direct financial aid to private sector - This set of measures is related to direct payments and aid to the business entities and entrepreneurs with a goal of continuity of salary payments.- Liquidity Measures for private sector - This set of measures is related to financing loans and guarantee scheme which will be provided with a goal of liquidity improvement during and after the state of emergency."
SPAIN	"1) Tax: The Spanish government approved measures extending terms in tax proceedings and in the settlement of debts from tax returns. 2) State-guaranteed loans: A guarantee line of 100 billion euros under which the Ministry of Economy agrees to provide bank guarantees to companies to obtain credit facilities to meet their needs for liquidity. A fourth tranche of guarantees was approved by the Spanish Government on 19 May 2020. Upon its activation, EUR 20 billion will be available to secure loans to SMEs. The beneficiary companies can use the financing obtained to cover their liquidity needs. 3) Labour: The government has made application procedures easier and more flexible for companies to obtain authorisation for an ERTE (Temporary Layoffs). Also, has approved a measure allowing deferrals of payment of Social Security contributions. The duration of ERTes based on Force Majeure grounds can be extended, at most, until 30 June 2020. 4) Preferential nature of teleworking to maintain business activity. 5) Resumption of tendering periods. The suspension of the deadlines for tender procedures has been lifted and new tendering procedures not related to COVID-19 can be processed if they are done electronically.6) Support measures for SMEs to promote their adaptation to the digital environment."
PORTUGAL	"The construction sector and related services remain operational all this period.75% of the companies' staff is on remote working, working from home."
BULGARIA	The measures against the coronavirus in Bulgaria continue to be relaxed. Specialists report a significant decline in the number of new cases. The government envisages a grant scheme to support mostly small and medium-sized businesses. Grants are provided to companies under favorable conditions, as well as loans with an interest-free period at the beginning. The applying procedures have already been open.
THE NETHERLANDS	"- General Measures for companies - compensation salaries - postponement of taxes - credit facilitation Measures for the building sector - - Joint declaration (by government and industry) to maintain or even accelerate construction activities as far as possible. - Followed by a joint Taskforce that i- A common action framework and clause in contracts on how to deal with payment terms and liquidity and with delays and uncertainties caused by COVID-19."

What useful tips, experiences and guidelines for restarting business after lockdown – that could be of interest to share with other companies and countries – have you heard of from your member companies?

SWEDEN	Sweden never closed down, so not really opening up. Just coming back to work/office after the summer from working at home.
FRANCE	Deconfinement measures are still on going. Working from home is still strongly advised, where and when possible
BELGIUM	"Uniform and clear regulations for an efficient continuation of the economy in general, and the projects in particular. Necessary that the economy keeps running without the risk of a second lockdown, which will impact everything. This is one of the main goals of FEB, the Federation of Enterprises in Belgium. See their campaign on https://o2.vbo-feb.be/ , supported by ORI. A lot of firms are working with a good mix of office work and teleworking, thus helping in lowering the risk of a second wave."
CZECH REPUBLIC	To take the crisis as the lesson and to be more active publicly after the crisis.
DENMARK	Opening up for all staff to be back in the office - but allowing a more permanent flexibility when it comes to working from home
NORWAY	RIF member companies share restarting guidelines and health guidelines through RIF organised network for HR - on Microsoft Teams.
UKRAINE	"1. Online business acquaintances and arrangements purchased during quarantine must be confirmed by personal meetings and negotiations. 2. In order to increase the efficiency of the company, it is necessary:- to analyse what new skills were acquired by staff during quarantine;- to update the management structure and internal operational relations, taking into account the new experience of remote work"
ROMANIA	"Two-thirds of ARIC members plan to continue with the WFH (Work from home) method until the end of the pandemic, at least for part of their employees. The rest of them comply with the measures indicated by the authorities:- increased sanitation of offices - providing protective equipment for employees - reconfiguration of work spaces to keep the social distance."

TURKEY	"Although not much feedback has arrived, it looks like a hybrid working regime will be established by the companies until the full normalisation will be achieved likely towards the end of this year. Hybrid method will combine home working and office working for the companies who have received good results from remote working. Some staff may request staying home due to care giving to children or to elder people, living at distance and not willing to use public transport or other valid excuses while some may prefer office work. Therefore a more relaxed or rotational working model may be established. In general having this unusual test of remote working for all firms enabled a unique opportunity to experience how remote working practice will effect their operations. The possibility of cost savings by increased remote meetings and work from home were tested by actual observations. Most probably this experience would result in many companies to plan their future growth or to maintain their firms considering these practices as their normal course of operation. Reduced overheads and more increased efficiency are the main points to consider."
SWITZERLAND	Federal council intends to boost economy by prioritising construction Projects, using public procurement means to favour national companies.
IRELAND	ACEI developed a Covid-19 site-safety advice note to support members on returning to site work and office and other workplaces.
SERBIA	"- To establish health and safety protocols for all employees.- Rethink and consolidate the financial plans and cash flow for the business and management.- Identify safe investments and focus on strategic planning in accordance with companies goals and current opportunities."
SPAIN	"- In general, companies are implementing some post COVID-19 employment plans: "Back to the office". These plans include sanitary, technical and organizational procedures, update the risk assessment, teleworking schedules, rules on the use of spaces and safety distance, etc. - Companies have implemented remote working to be able to continue with their activity and the majority have responded satisfactorily. However, some companies consider that it is still too early to measure the productivity of teleworking. - In the restarting business activity, a "Recovery Plan" based largely on sustainability & climate change is being advocated by the Spanish engineering sector. Many companies identify opportunities in the development of future projects within these areas, where significant investments are expected from the European Union and other international organizations."
PORTUGAL	We believe that the European Programme will be of great importance, including for our sector.
THE NETHERLANDS	"Protocol for safe return to working in the office. Protocol for Safe Operation under the Restrictions of COVID-19"