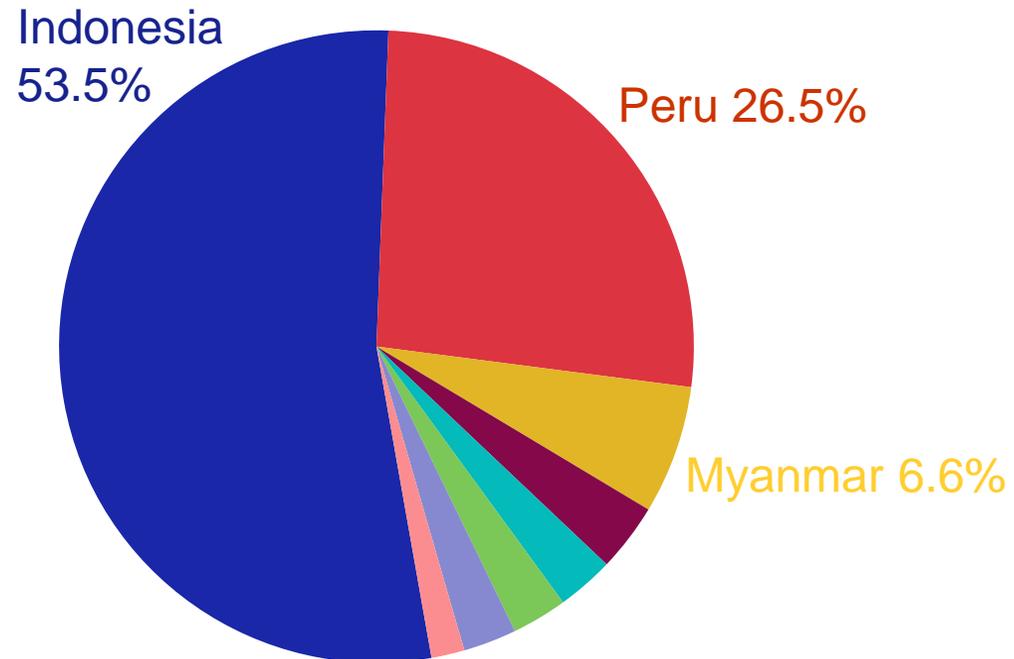




ILO SCORE Global Covid-19 Enterprise Survey

How are enterprises affected and how can
we support them?

▶ Responses from eight countries



1066 enterprises:

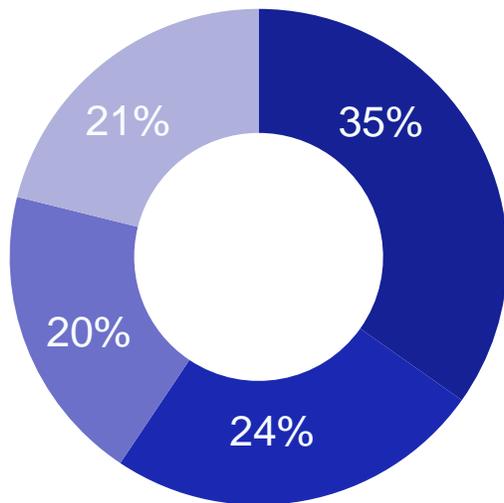
- ▶ 570 from Indonesia
- ▶ 282 from Peru
- ▶ 70 from Myanmar
- ▶ 37 from Colombia
- ▶ 31 from Ghana
- ▶ 30 from Tunisia
- ▶ 29 from Bolivia
- ▶ 17 from Pakistan

To avoid bias towards countries with larger sample sizes, data from each country has been given equal weight in the aggregate analysis

Enterprise characteristics

Size

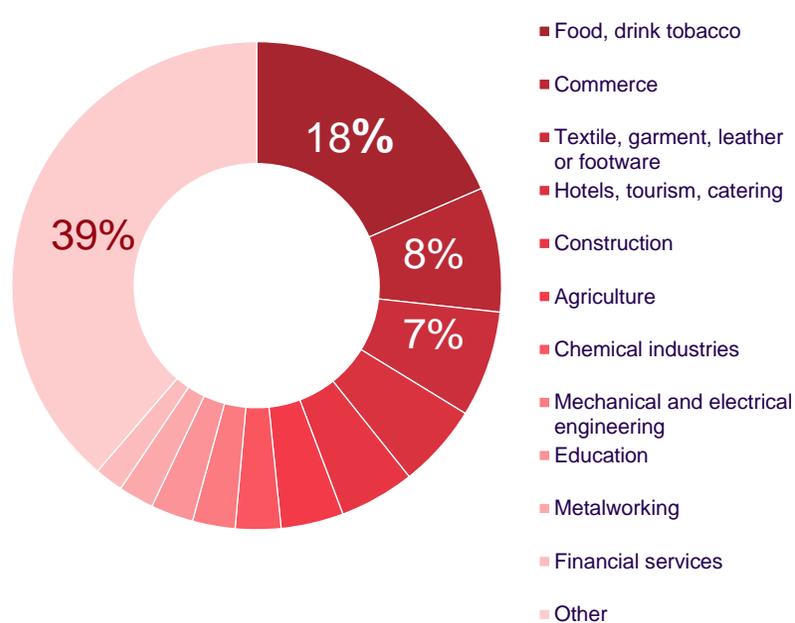
>50% micro enterprises 21% are large enterprises



■ Below 10 ■ 11 to 50 ■ 51 to 250 ■ Above 250

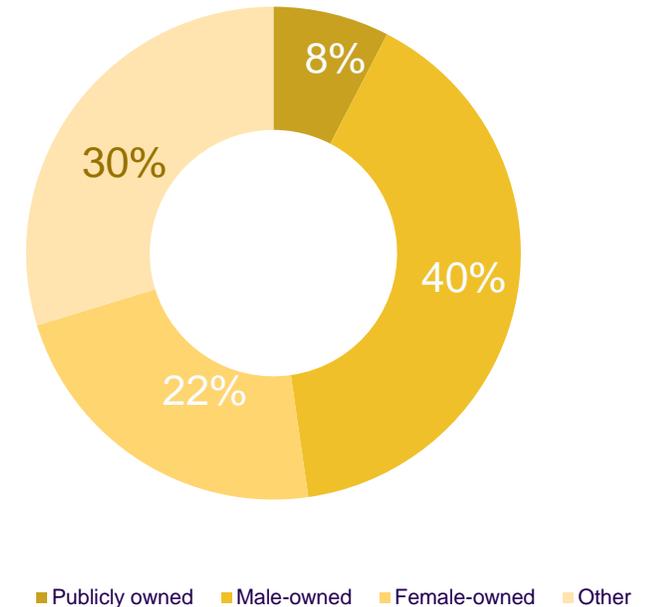
Economic activity

Most common industries: Food & Beverages, Commerce and Textile



Ownership

92% private sector 22% owned by a woman



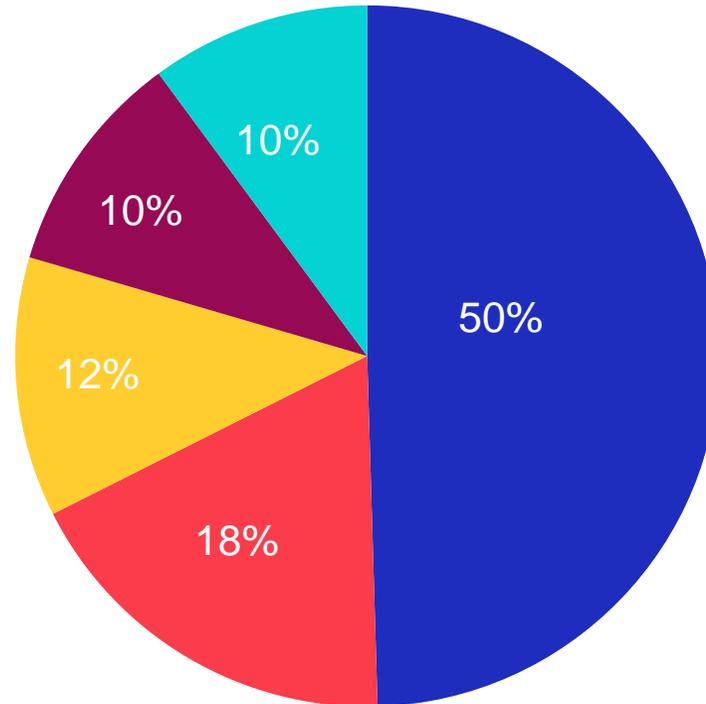
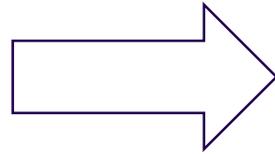
■ Publicly owned ■ Male-owned ■ Female-owned ■ Other



Impact of Covid-19 on business operations



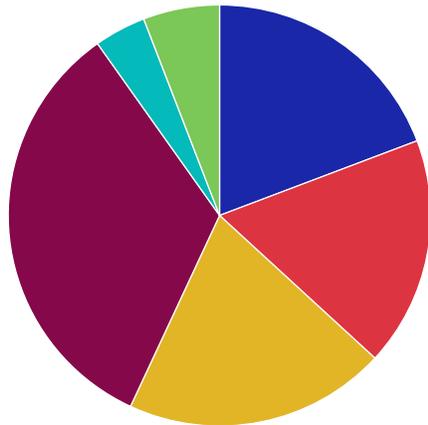
Has your enterprise stopped operations due to Covid-19?



- 50% temporarily stopped because of instructions by authorities
- 18% temporarily stopped because of reduced orders
- 12% permanently stopped
- 10% temporarily stopped because of Covid-19 cases in the business
- 10% stopped operations previously but currently running again

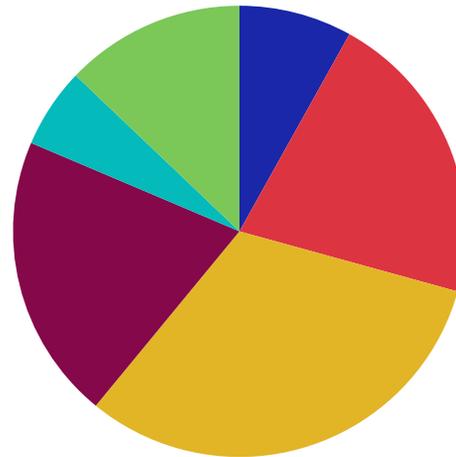
Revenues – outlook is grim

Current Situation



■ None
■ -25% to -50%
■ Increase
■ 0 to -25%
■ -50% to -100%
■ Don't know

Expected for 2020



■ None
■ -25% to -50%
■ Increase
■ 0 to -25%
■ -50% to -100%
■ Don't know

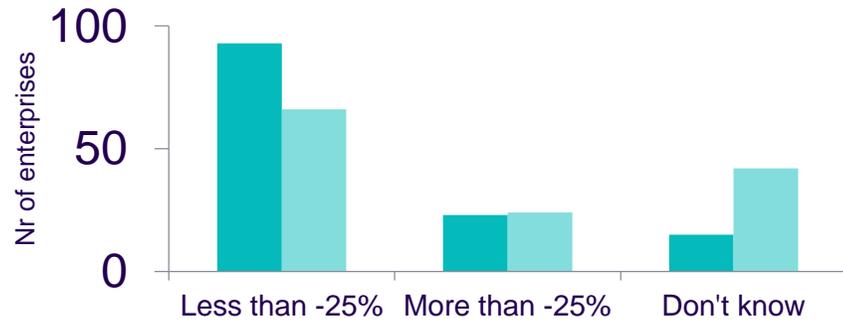
▶ **75%**
experienced reduction in revenues

▶ **1 in 3**
lost more than 50% of revenues

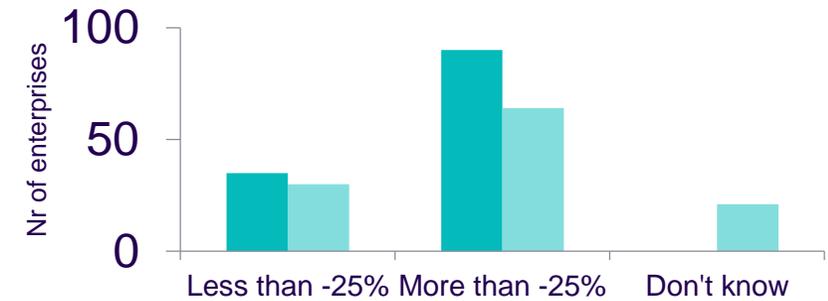
▶ **79%**
expect revenue reduction for all of 2020

Revenues – entrepreneurs in some countries expect the situation to improve over the year

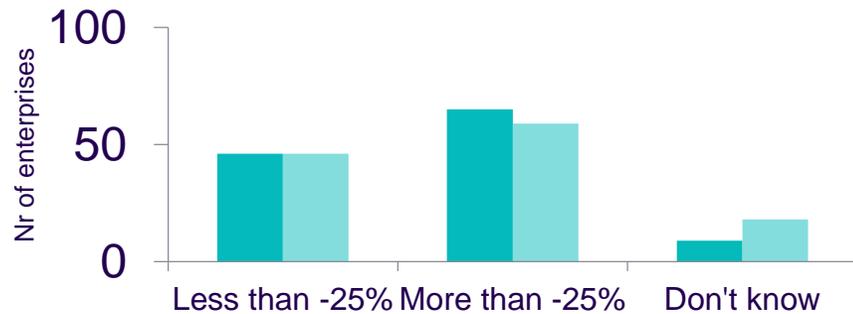
Myanmar



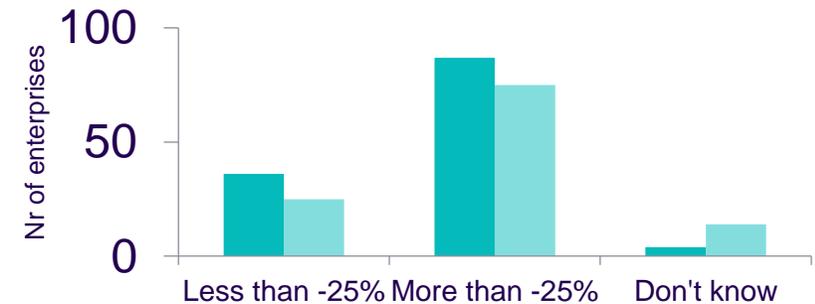
Ghana



Bolivia



Colombia

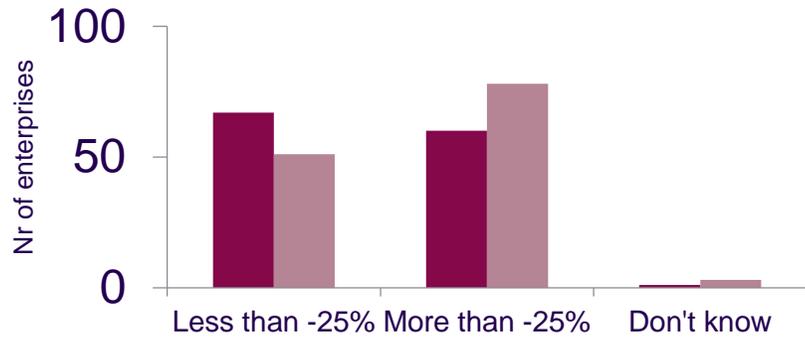


■ = Current situation

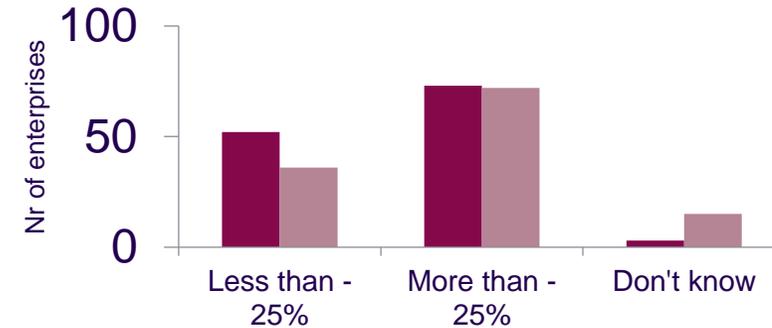
■ = Expected all 2020

Revenues – entrepreneurs in other countries expect losses to continue for all 2020

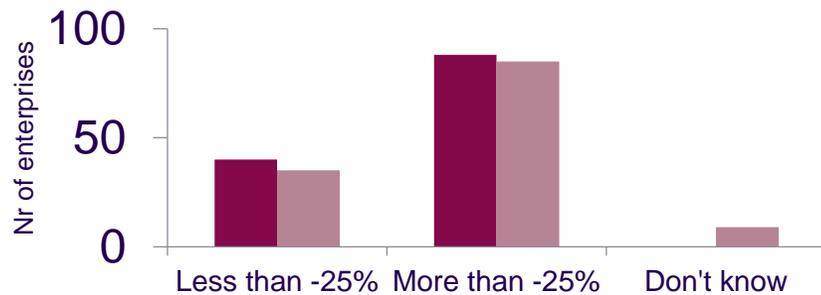
Indonesia



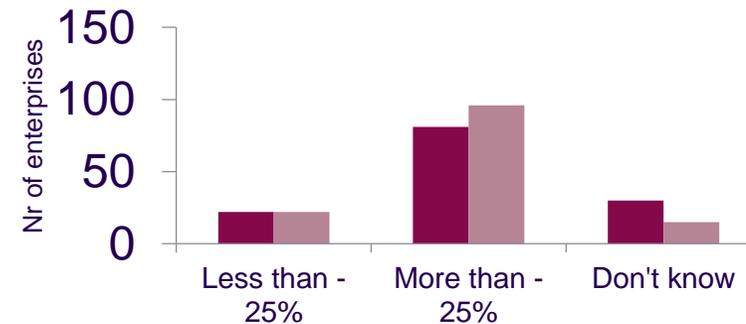
Peru



Tunisia



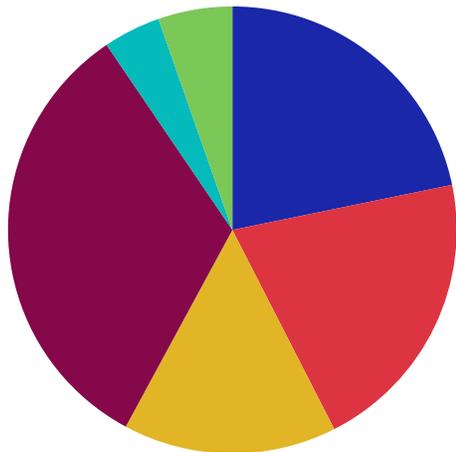
Pakistan



■ = Current situation ■ = Expected all 2020

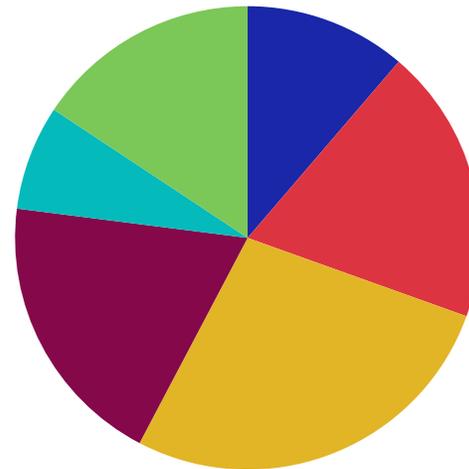
Orders – similar picture as for revenues

Current Situation



■ None
■ 0 to -25%
■ -25% to -50%
■ -50% to -100%
■ Increase
■ Don't know

Expected for 2020



■ None
■ 0 to -25%
■ -25% to -50%
■ -50% to -100%
■ Increase
■ Don't know

▶ **73%**

experienced reduction in orders and expect reduced orders for 2020

▶ **33%**

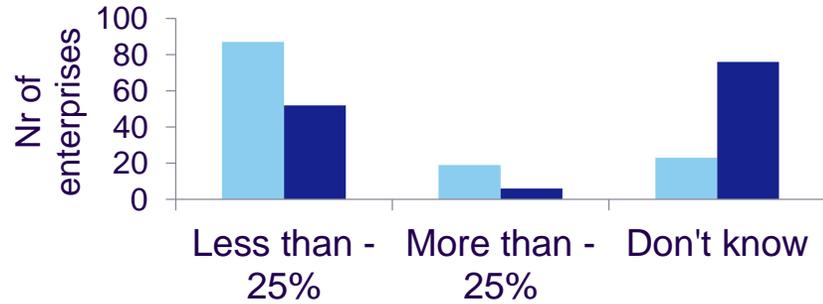
Suffered reduction of more than 50% of orders

▶ **19%**

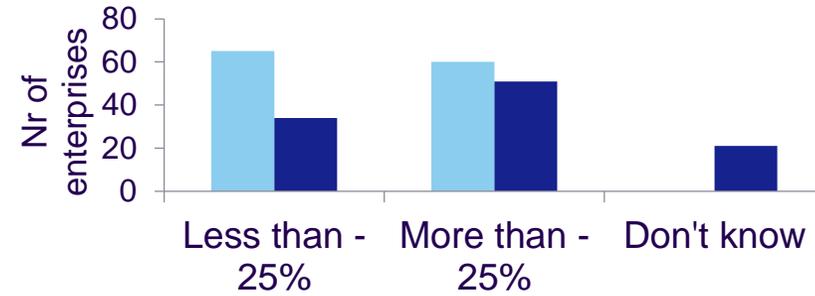
expect more than 50% order reduction for all of 2020

Orders - entrepreneurs in some countries are more optimistic orders will bounce back soon

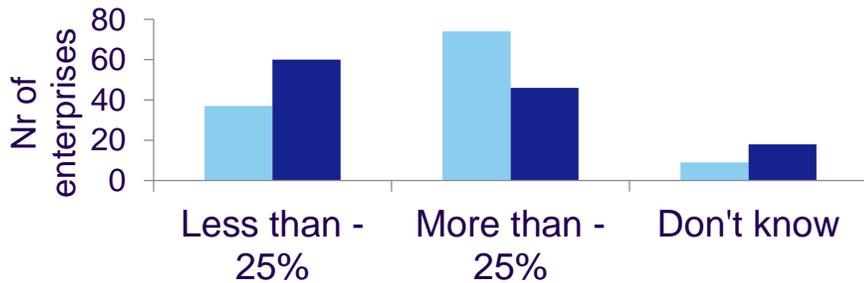
Myanmar



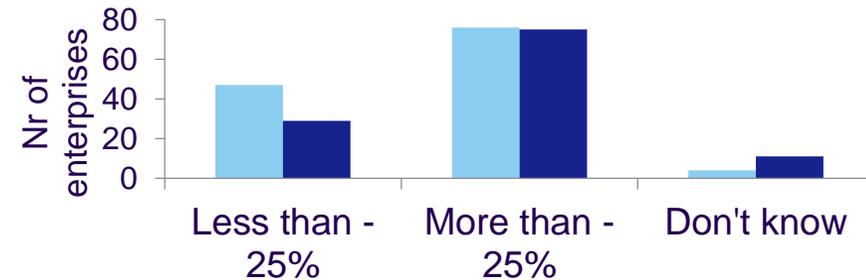
Ghana



Bolivia



Colombia

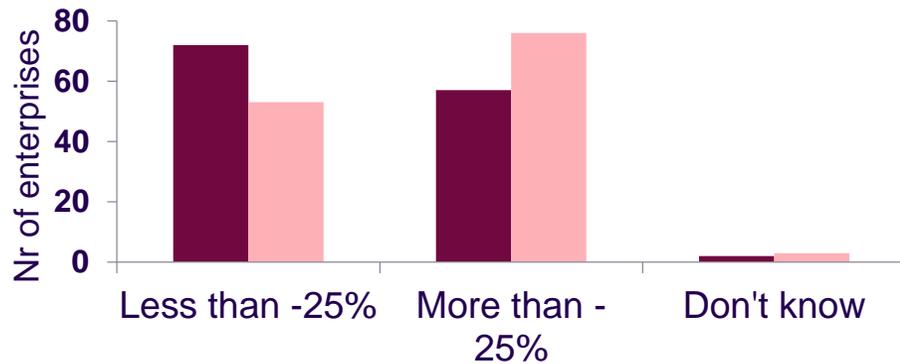


■ = Current situation

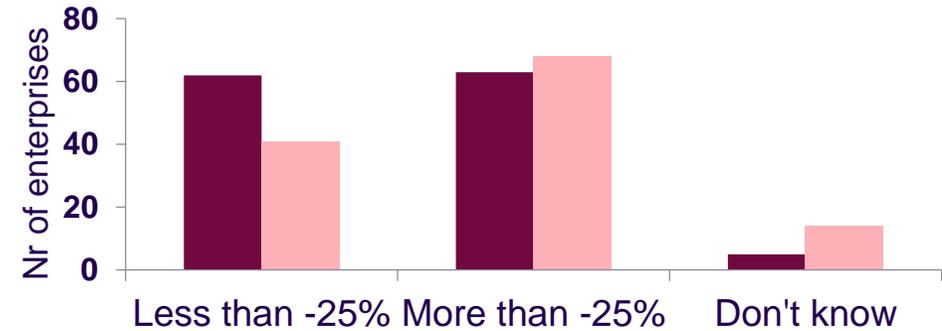
■ = Expected all 2020

Orders - impact currently vs all 2020 - less optimistic countries

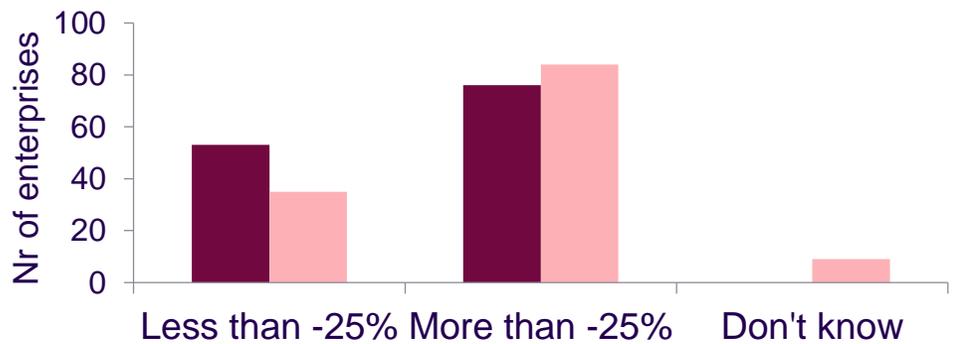
Indonesia



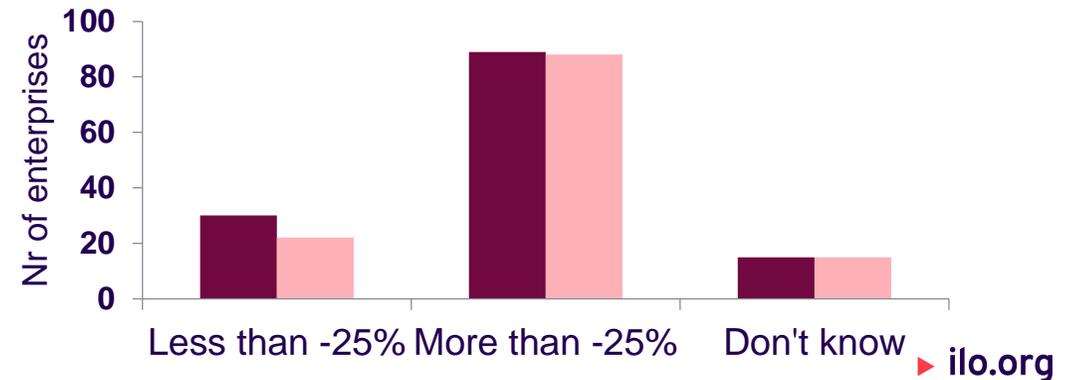
Peru



Tunisia



Pakistan



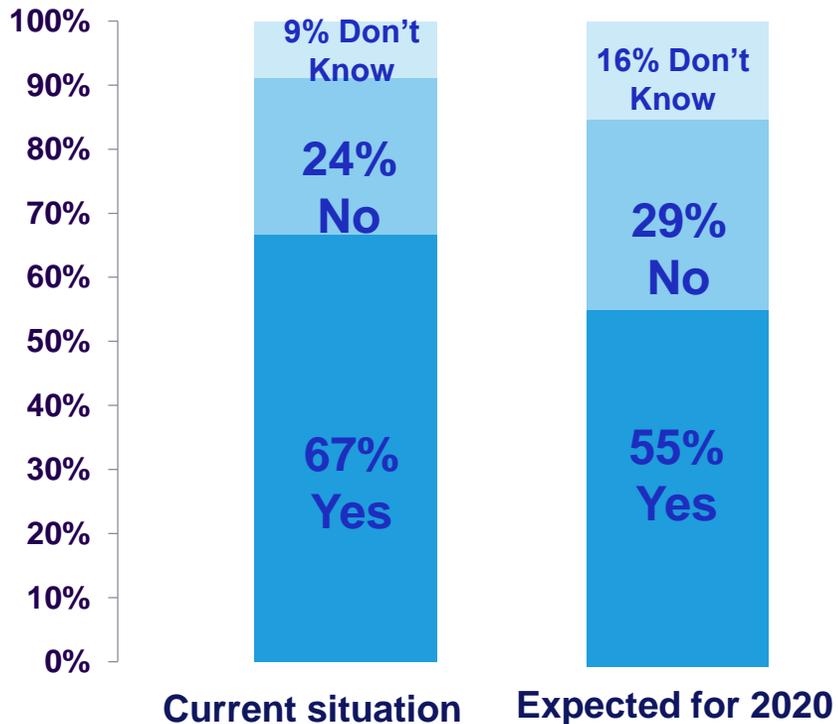
■ = Current situation

■ = Expected all 2020

Majority report supply chain impacts, likely to persist

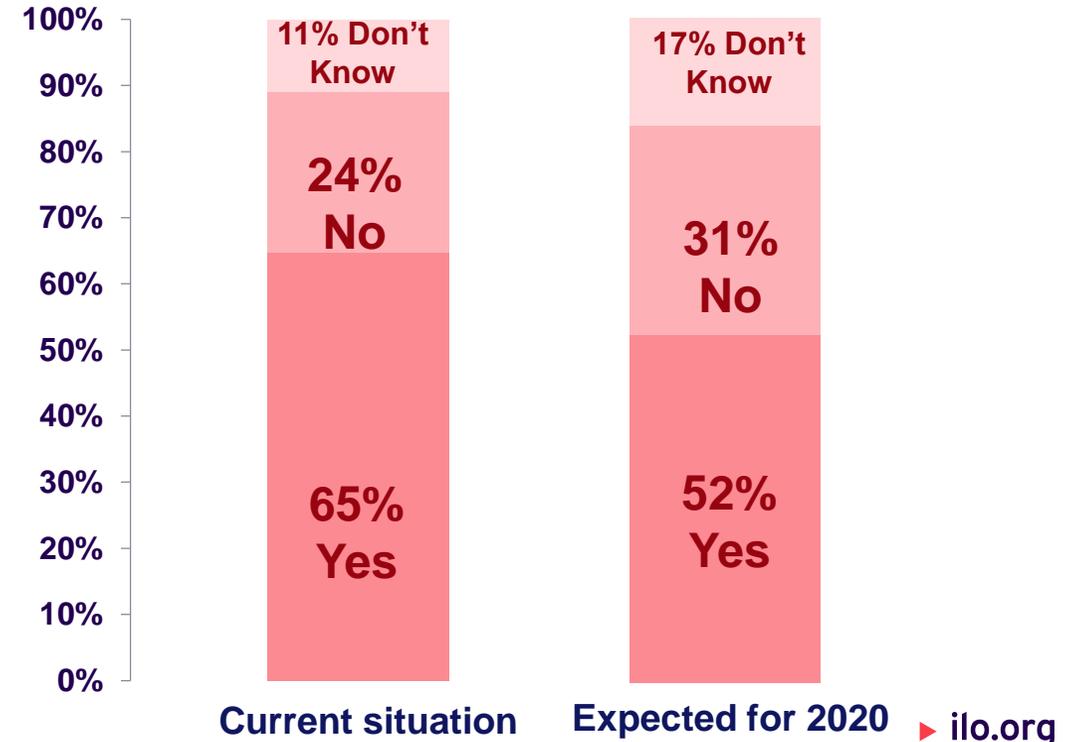
Supplies/input materials

67% of the enterprises face a shortage of supplies

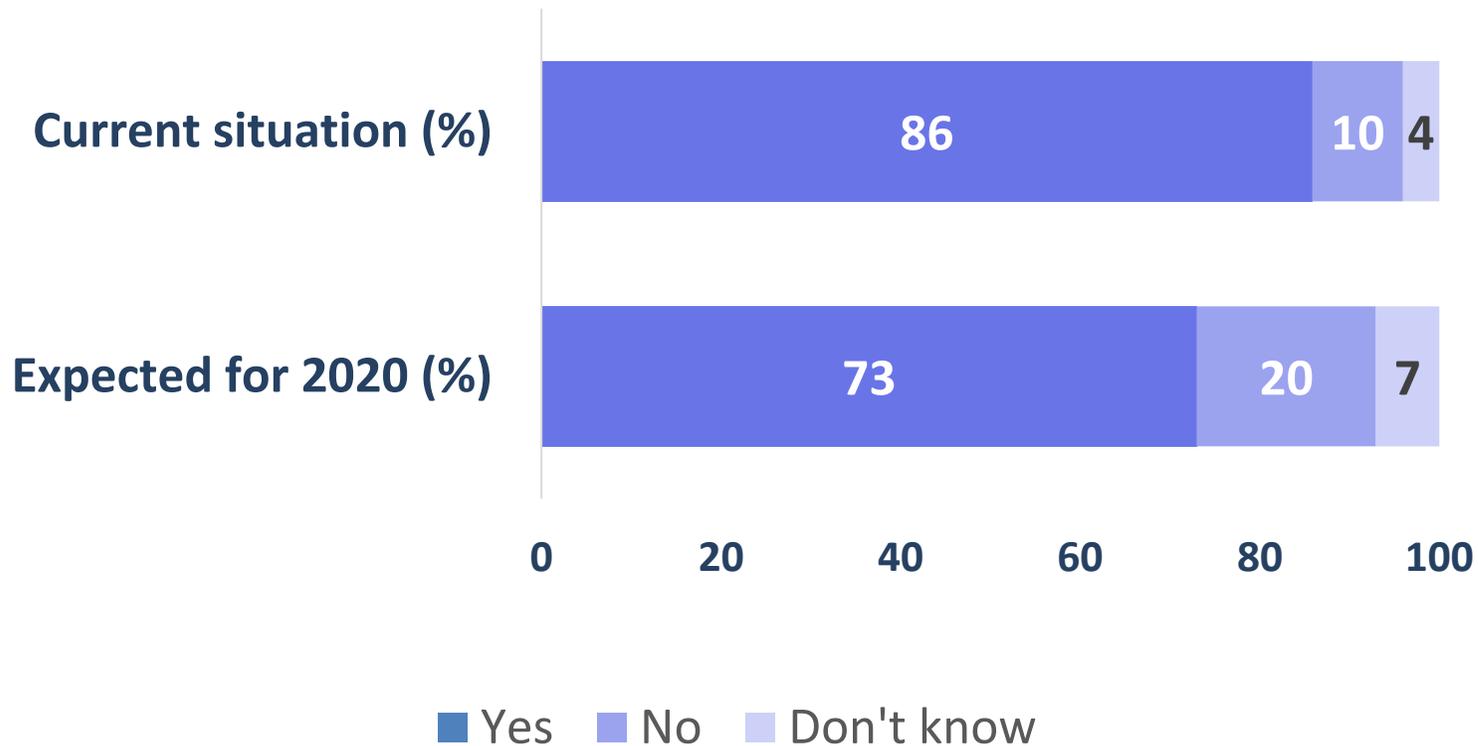


Shipping of finished goods

65% of enterprises report problems shipping goods



Cash Flow – situation is critical worldwide



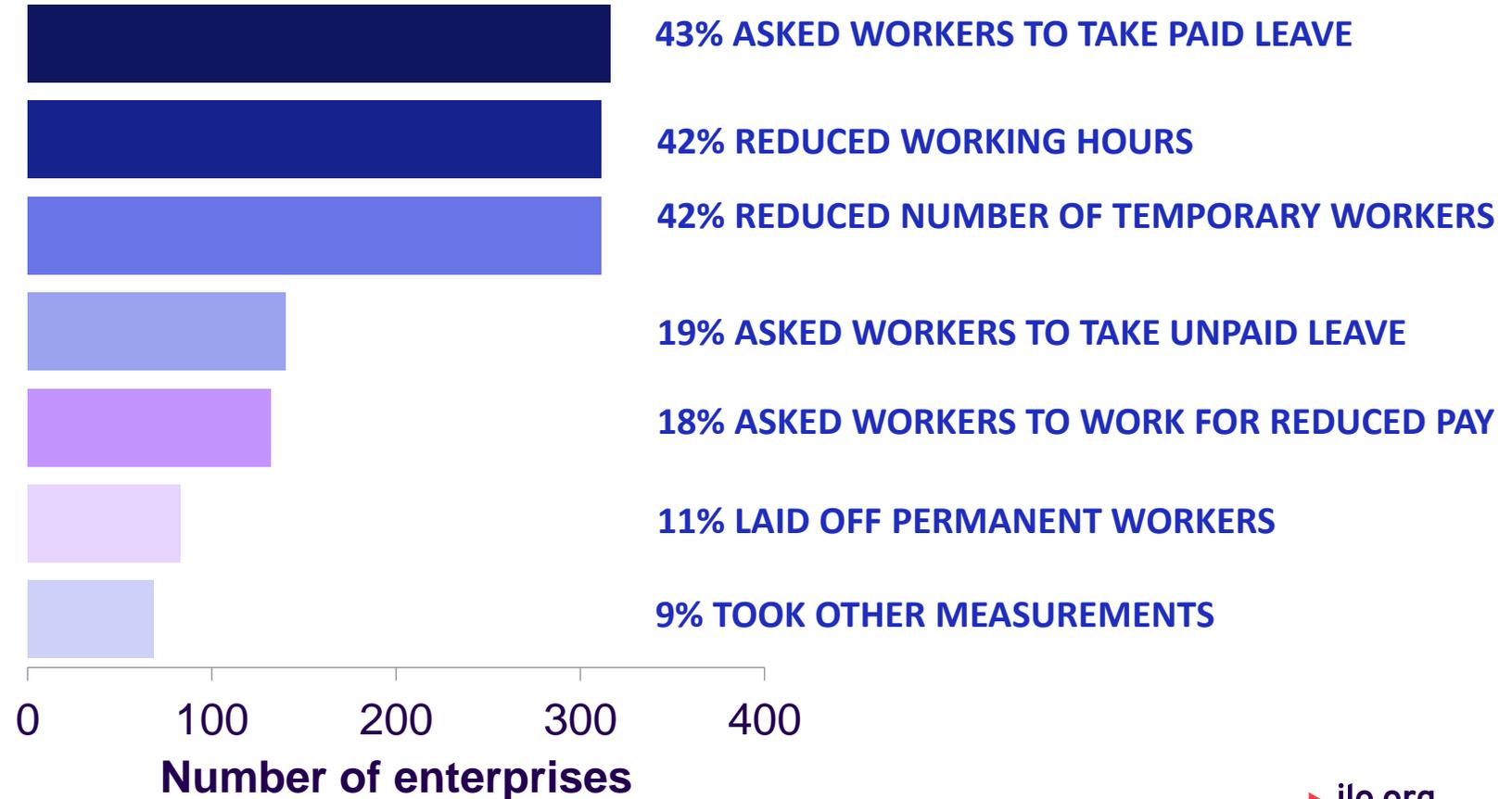
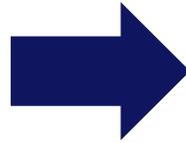
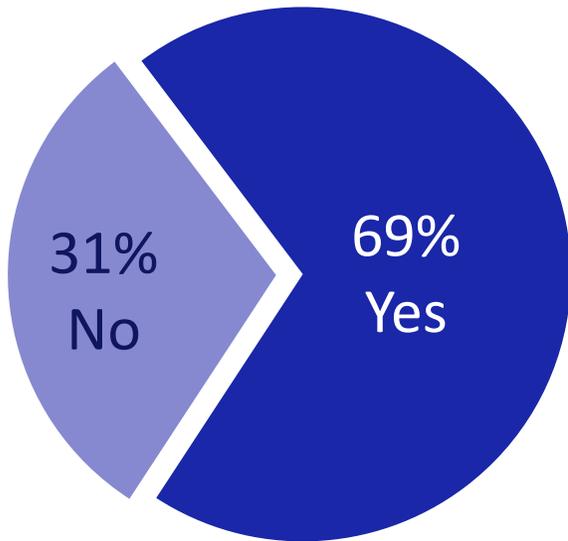
▶ **86% of enterprises experienced a shortage of cash flow**

▶ **73% of enterprises expect a shortage of cash flow; 7% can't tell yet**

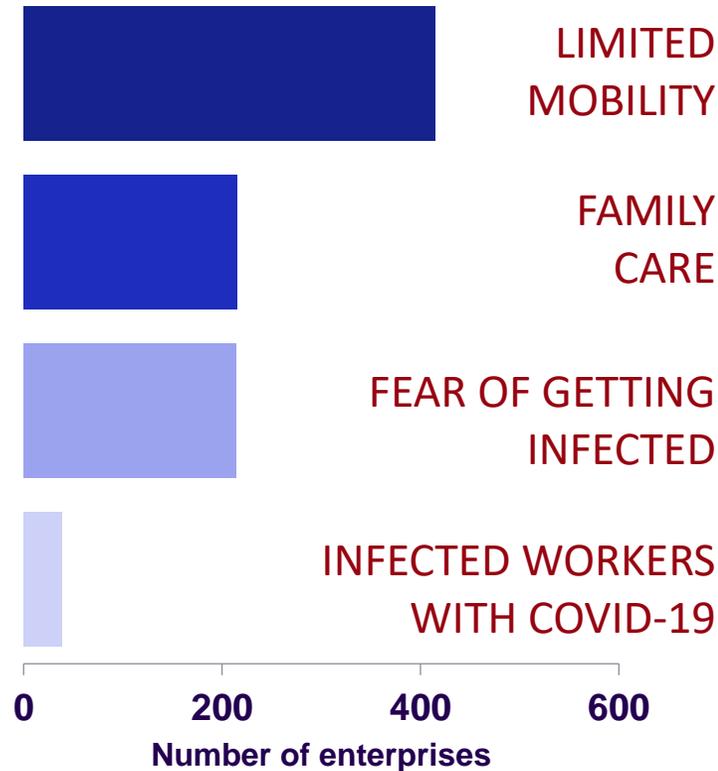
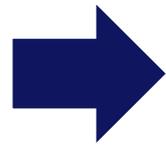
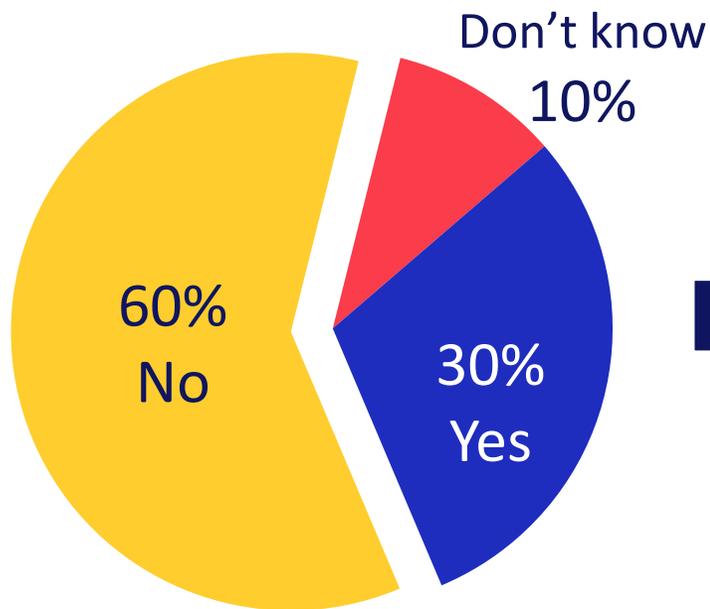
► Impact on Labour Force



69% reduced over-capacity of labour



1 in 3 enterprises is short of workers



LIMITED
MOBILITY

▶ 100% report restrictions in workers' movement or quarantined

FAMILY
CARE

▶ 52% report workers don't come to work because of family care needs

FEAR OF GETTING
INFECTED

▶ 52% report workers staying away as they are afraid of getting infected

INFECTED WORKERS
WITH COVID-19

▶ 9% report that shortages are due to workers being infected

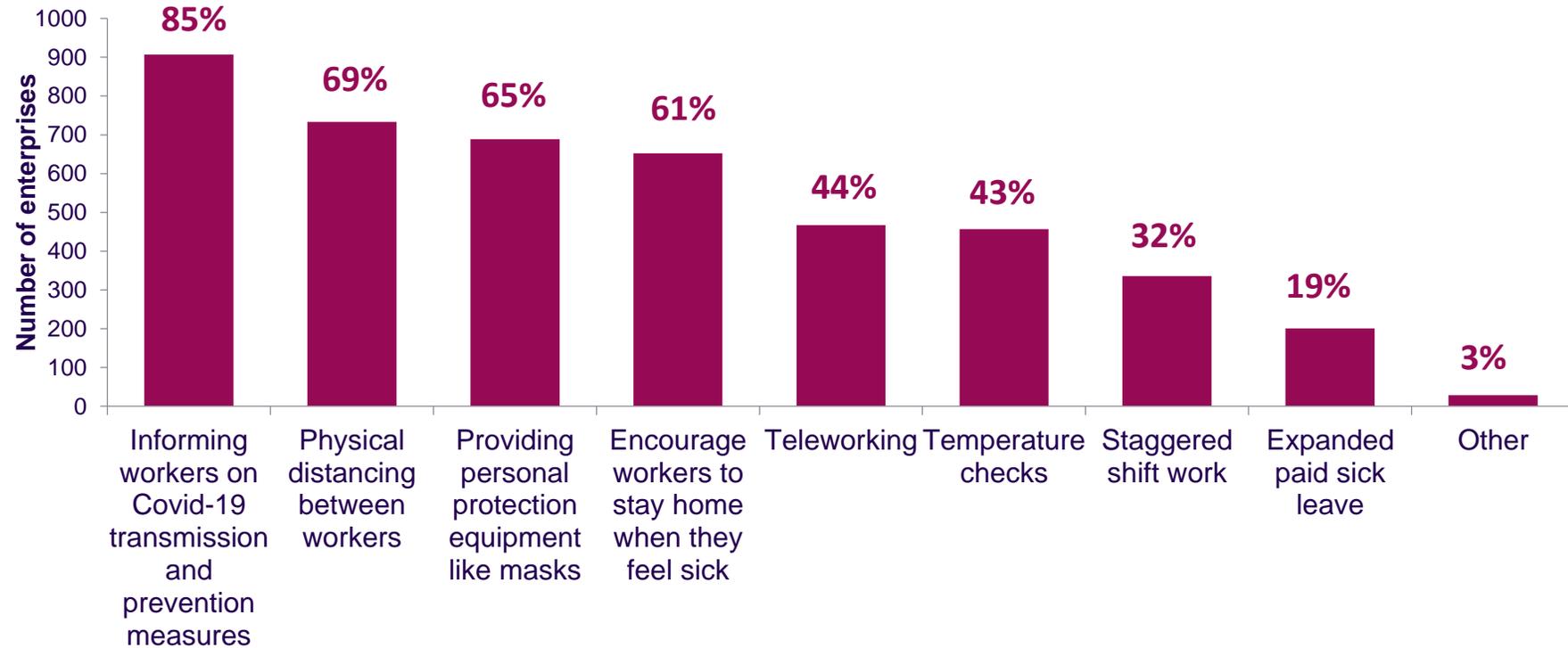
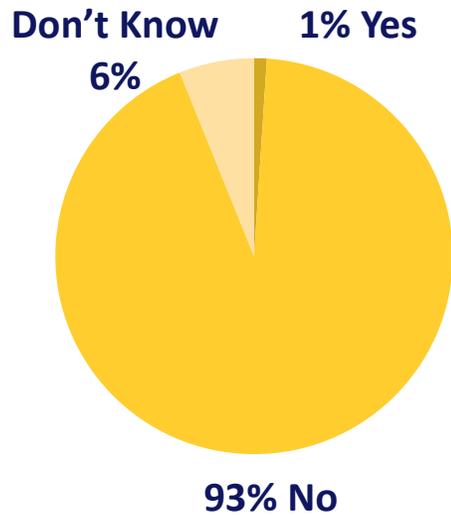


Health and safety in the workplace



What are enterprises doing to protect workers?

Have any of your workers contracted the virus?





How are companies responding?



How are enterprises responding?



Enterprises responses by size

▶ **Negotiation of payment terms with banks**

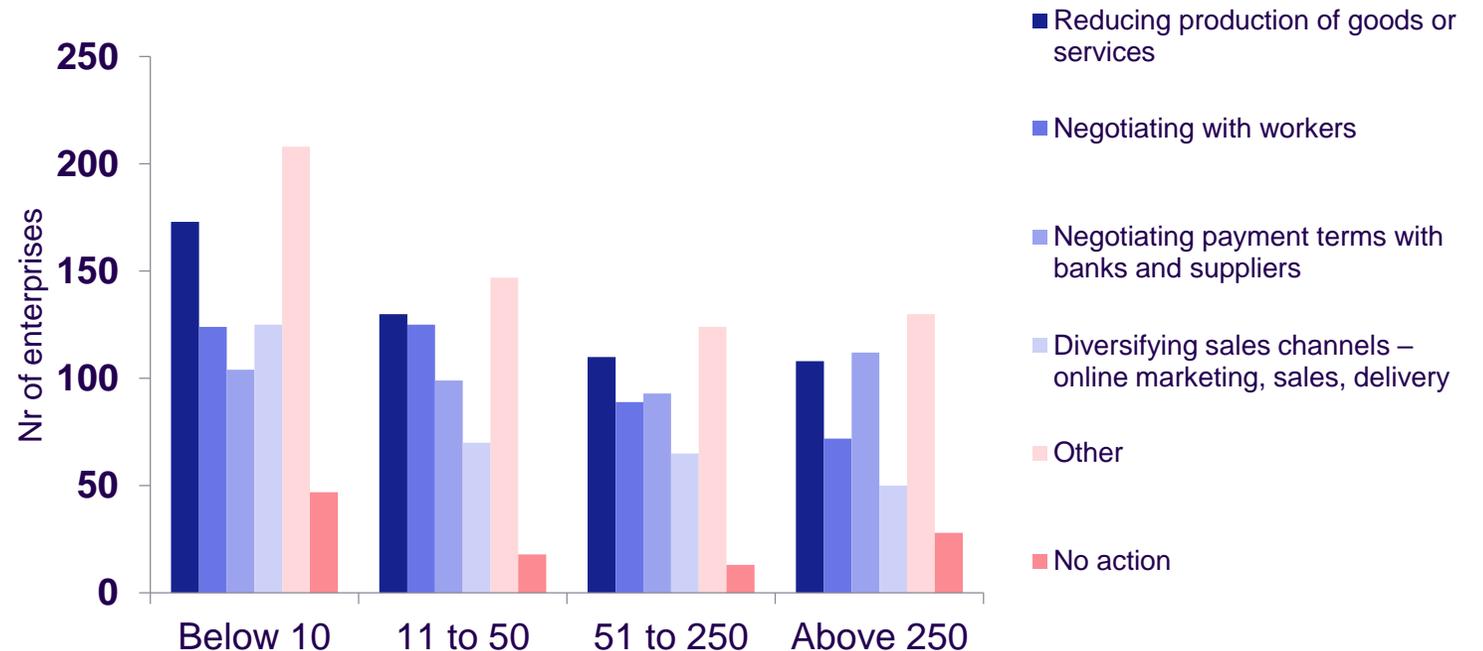
28% of micro enterprises vs 50% of SMEs

▶ **Diversification of sales channels**

22% of large enterprises vs 30% of MSMEs.

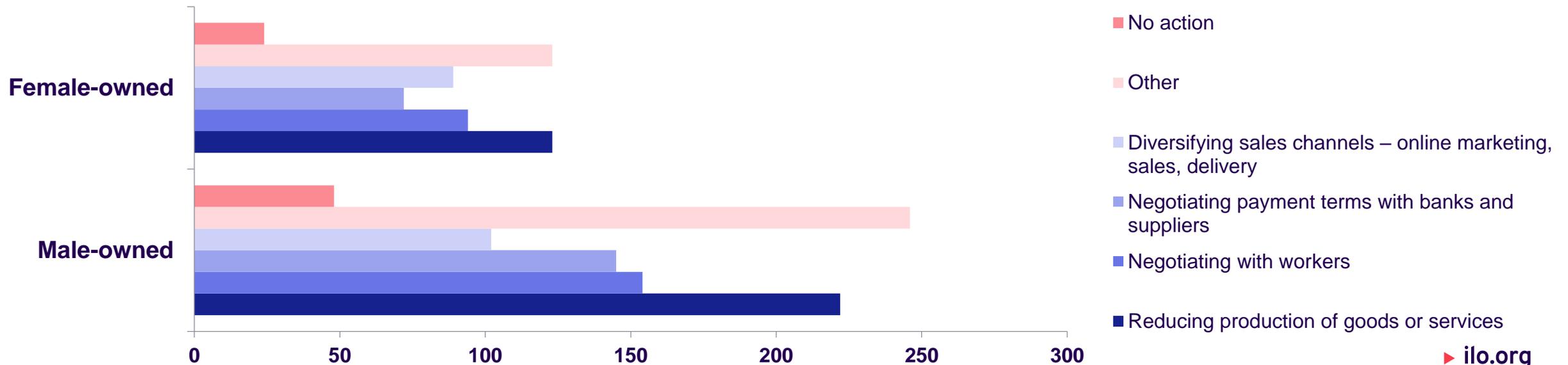
▶ **Negotiation with workers**

45% of small and medium enterprises vs 32% of micro and large enterprises



▶ Responses by women-owned enterprises

- ▶ **Few differences, likely size-related**
- ▶ **Women-owned enterprises are more likely to diversify their sales channels**
37% vs. 24% of those owned by men
- ▶ **Women-owned enterprises are less likely to negotiate with banks and suppliers**
30% vs. 34% of those owned by men





What support do enterprises want?

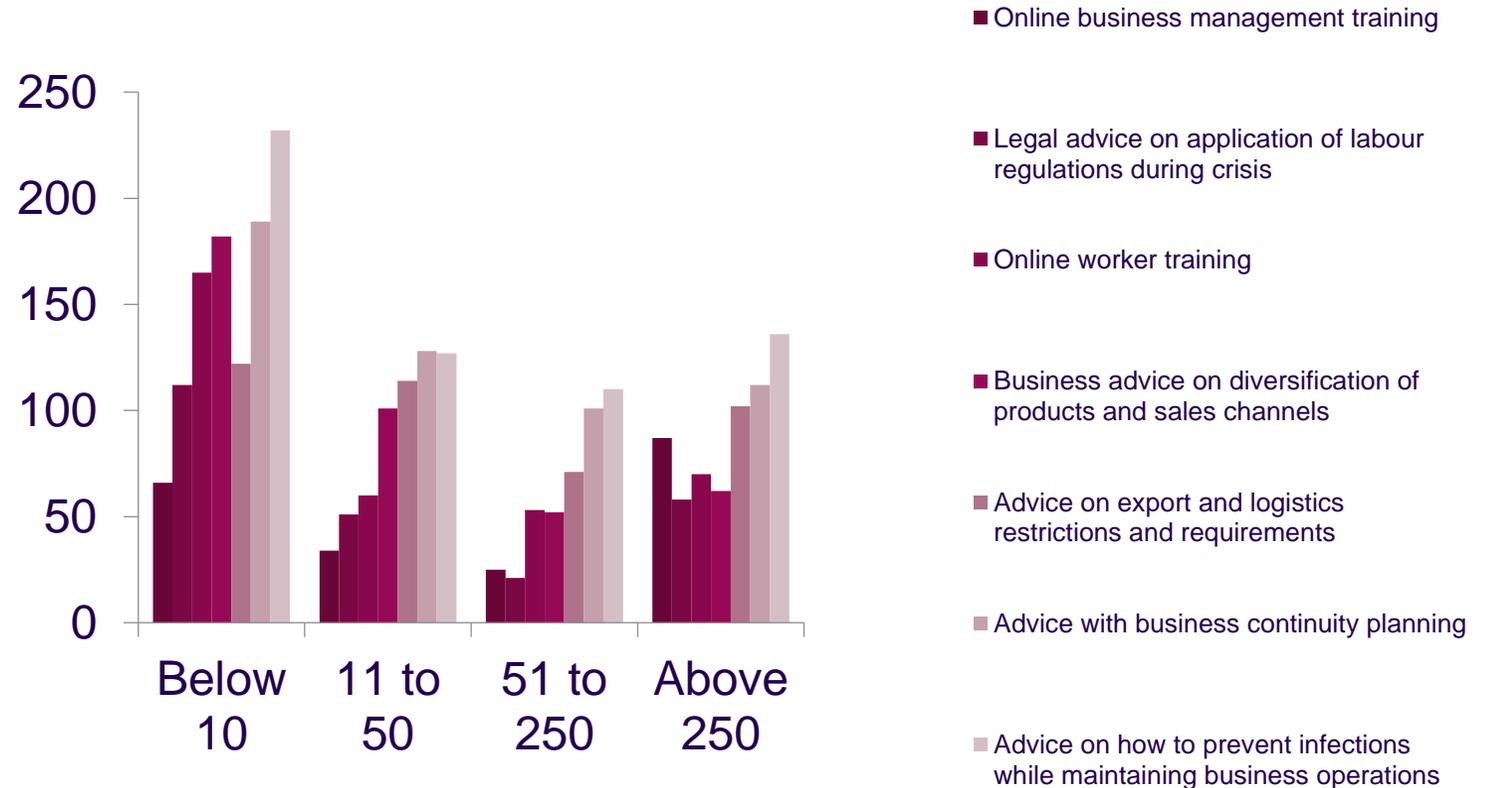


What services do enterprises want?

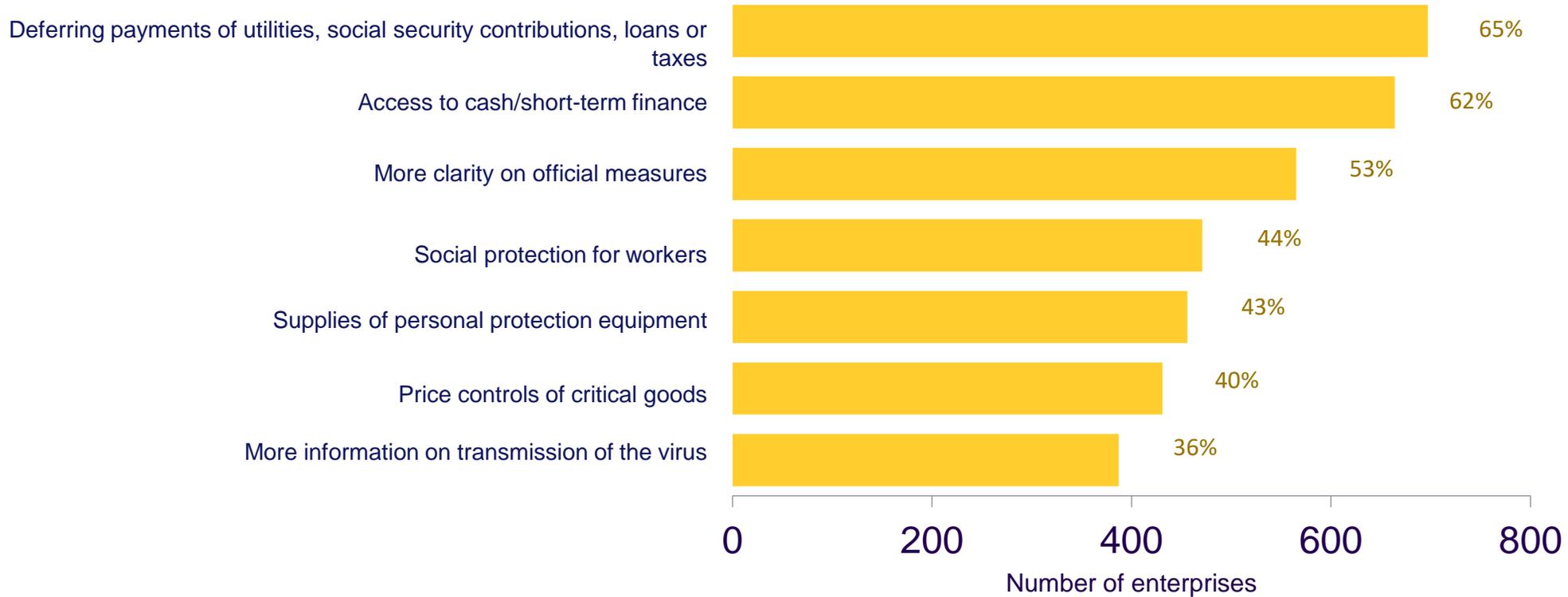


Enterprises needs by size

- ▶ **Advice on diversification of products and sales channels**
~50% of micro enterprises vs. 31% of SMEs
- ▶ **Online business management training**
39% of large enterprises vs 15% of MSMEs
- ▶ **Legal advice on labour regulations**
30% of micro enterprises vs 20% of small and 10% of medium-sized enterprises



What Government action do enterprises want?



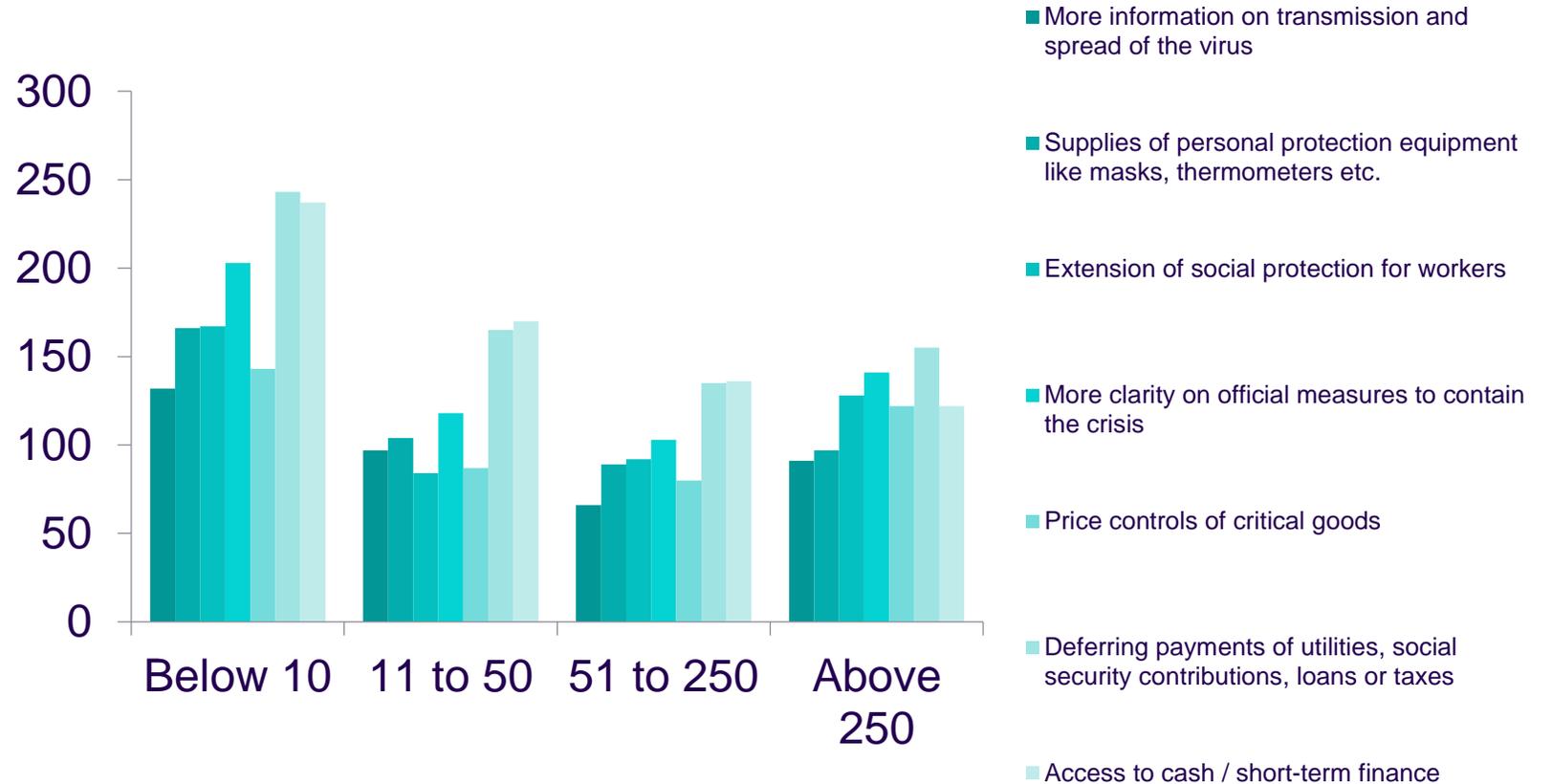
Enterprises responded differently depending on size

Access to short-term finance

- ▶ 65% of MSMEs vs 54% of large enterprises

Extension of workers' social protection

- ▶ 57% of large enterprises vs 40% of MSMEs



▶ Conclusions

Economic prospects for SMEs grim worldwide

- ▶ Revenues, orders, cash flows supply chains heavily impacted
- ▶ Reductions of workforce through various measures

Enterprises need quick assistance

- ▶ Cash and short-term loans, relief of fixed costs
- ▶ Clarity on official measures and post-lockdown regulations

Enterprises want business continuity advice

- ▶ Strategy/financial/logistics advice
- ▶ Covid-19 OSH guidance