

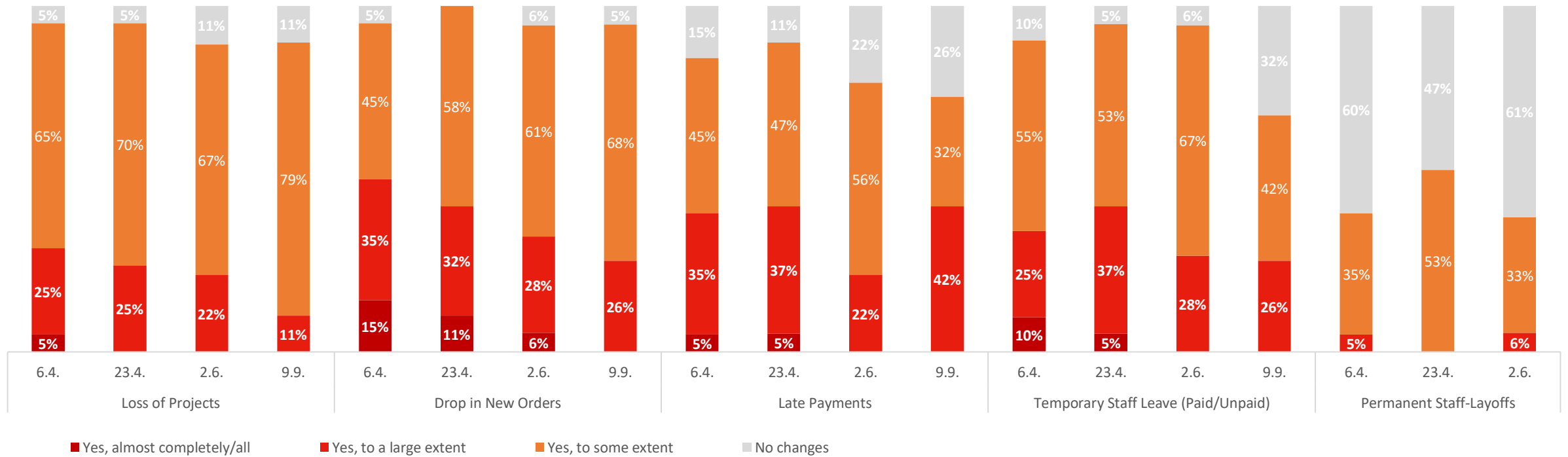
OVERVIEW

- Survey IV: conducted between September 1st and 7th, 2020.
- 10 questions (8 closed, 2 open)
- 19 EFCA MAs responded (approx. 2/3rd)

Main conclusions:

- **Overall:** Signs of stabilization, yet still long way to go
- **Orders:** Stabilizing, fewer losses of projects and less drop of new orders
- **Staff:** Both temporary and permanent layoffs are dropping
- **Private sectors** and **Exports** are highly affected, nearing stand still, while **Public sectors** around Europe are also affected, but to a lesser degree and showing signs of stabilization

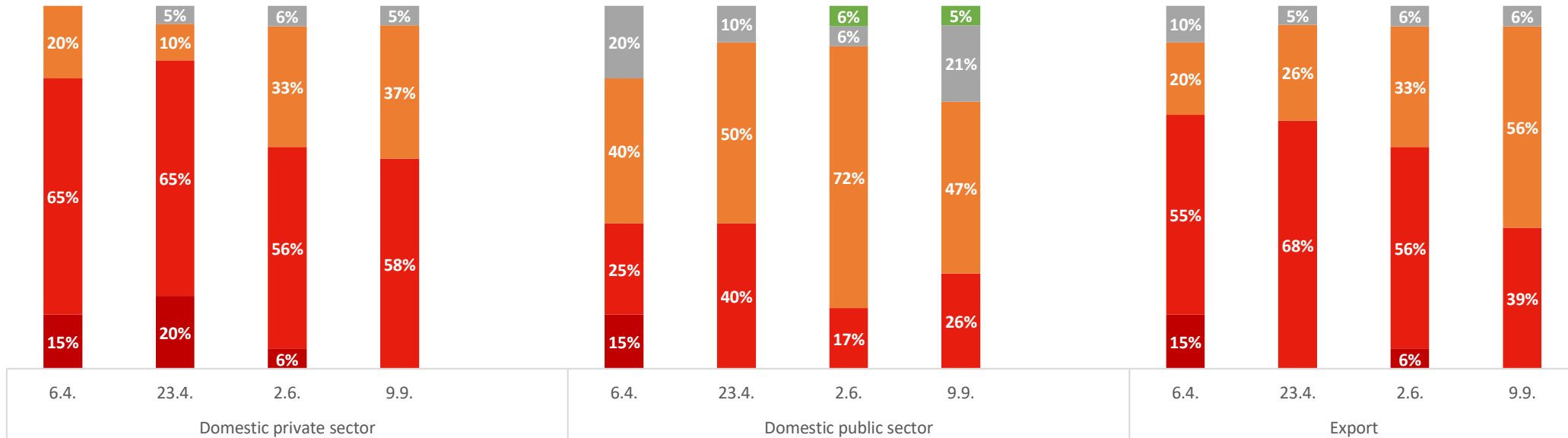
How are companies affected?



6.4.: n= 20; 23.4.: n= 20; 2.6.: n=18; 9.9.: n=19.

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

- Deteriorated, market has stopped
- Deteriorated to a large extent
- Deteriorated to a lesser extent
- Unchanged
- Improved



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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.

AUSTRIA	<p>Various measures for affected companies; for example: - short-time work - it is possible to reduce or defer contributions to social security for the self-employed - hardship fund for one-person businesses and micro-enterprises - tax deferrals, a reduction of advance tax payments - the bridging guarantees that are already in place for working capital loans for one-person businesses/SMEs will be continued and expanded</p>
BELGIUM	<ul style="list-style-type: none"> • Support measures for companies affected by the coronavirus-crisis. • Implementation of temporary unemployment due to force majeure for employees of for example engineering firms. • Deferral of the repayment of business loans (for a max of 6 months). • Support measures for implementation of teleworking. • Launch and continuation of public infrastructure projects.
DENMARK	<ol style="list-style-type: none"> 1. Increased public spending. <ol style="list-style-type: none"> a. Particularly allowing local governments to increase spend on capital projects and renovation, such as schools and roads b. Increasing the funds available for renovation of social housing 2. Postponing the due date for payment of taxes etc. (i.e. increasing liquidity). <p>In addition, there has been general subsidies for other businesses and industries, prohibiting a more severe collapse of the economy. Also we have seen building sites be open throughout the COVID-19 crisis.</p>
ESTONIA	<ol style="list-style-type: none"> 1) In a crisis situation, the state continued to invest in the construction sector to the extent planned. The government adopted a supplementary budget and offered support measures to businesses. Investments were slightly increased (supplementary budget and European Structural Funds). 2) Companies in difficulty were able to apply for salary subsidies in the spring. Principles of paying the subsidy were: The subsidy was paid, when a company was in a situation where they comply with at least two of the following terms: <ul style="list-style-type: none"> * The company had to have suffered at least a 30% decline in turnover or revenue for the month they wish to be subsidized for, as compared to the same month last year. * The employer was not able to provide at least 30 percent of their employees with work. * The employer was cut the wages of at least 30% of employees by at least 30% or down to the minimum wage

FRANCE	After having put in place measures to ease temporary unemployment (paid), authorities now set up these arrangements for a long period. In the same time, a plan (100 B€) to rebuild activity is launched. It will decrease taxes, help energy efficiency and reshape skills.
GERMANY	Support local authorities to keep up their investments in building infrastructure. Take over gaps of reduced trade taxes by the federal government. Pay companies that use short-time work programs.
GREECE	Payment in installments of tax liabilities for our member companies.
LATVIA	Government allocated extra funds for public sector to increase the amount of tenders in public sector. In case the company has difficulties with the positive cash flow, there are possibilities to get some tax holidays (postponement of paying taxes up to 3 months)
NETHERLANDS	Additional to the measures reported before, the government has started an investment fund for a sustainable earning capacity of our economy.
ROMANIA	The government increased the guarantee ceiling from the SME Invest program to 20 billion lei (approx. 4 billion euros). Through the program: the state provides up to 90% of the loan amount, the interest on loans is fully subsidized by the state at least until the end of the year, zero commissions related to the state guarantee, zero commission for early repayment of the loan, and the period of granting the guarantee is up to 72 months. A subsidy program has been set up for employers who employ unemployed people over the age of 50 or between the ages of 16 and 29. A new normative act adopted in august approves indemnities settled from the unemployment insurance budget to compensate for loss of salary income as a result of the reduction of the work schedule, or loss of income from work, in the case of professionals. (Kurzarbeit model).
SERBIA	Tax policy measures: Delay of tax payment for the beginning of 2021. Payment of minimum wages for the private sector in order to reduce lay off of the employees.

SPAIN	<p>1) ICO COVID-19 Line of guarantees. This line of aid is helping maintain economic activity and jobs, facilitating access to credit and the liquidity of companies and self-employed individuals.</p> <p>2) The government has extended the measures approved in the state of emergency until late September and also agreed to reactivate the economy in the fields of transport and housing.</p> <p>3) The Spanish Government has approved a number of economic measures, including financing the digital transformation of firms. Among the measures is a plan to back €40 billion of loans aimed at the digital transformation of companies and adapting them to sustainable processes, as well as a €10 billion fund to shore up companies outside the financial sector that have been affected by the pandemic.</p> <p>4) Government to allocate 140 billion euros from European Recovery Fund to modernise economy and alleviate social effects of COVID-19.</p> <p>5) The Council of Ministers authorised the Institute for Energy Diversification and Savings (Spanish acronym: IDAE) to activate the first round of support from a package to boost renewable energies with an initial provision of 316 million euros.</p>
SWEDEN	<p>First sick-day paid. Usually unpaid. Furloughings paid by the state, to a large extent. Companies can "borrow" VAT & tax-payments. Some reimbursement for lost turnover/income.</p>
SWITZERLAND	<p>Financial support for short term leaves has been extended. Other than that, no changes compared to previous survey.</p>
TURKEY	<ul style="list-style-type: none"> • It was possible to have virtual meetings rather than face to face. • “Short Time Allowance” extended up to the end of November 2020. • Engineer/Consultancies of age 60+ requested to stay home and continue to work from home. • Rotating working schedules are introduced. • Digital procedures are improved. • Measures to facilitate remote working. • Construction works continued without interruption. • Some travel restrictions of age 65+ within country.
UKRAINE	<p>The Great Construction Program which provides for major repairs or construction of roads and infrastructure facilities in Ukraine for 5 years is ongoing. Since May 2020, within the framework of this program, the State Road Agency of Ukraine has introduced the practice of involving independent technical supervision over road construction. This enables consulting engineering companies to take part in the relevant procurement procedures.</p>

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?

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 future lockdown, which will impact every aspect of society.
DENMARK	Mores flexible working hours - also allowing "overworked hours" to be negative. Postponed regulation of pay. Opening up for much more "from home"-work both technically and in the way that teams and companies' function.
LATVIA	Return back to the office in step-by-step manner, start with 20% per week, then increase it gradually
ROMANIA	Most companies have resumed office work with a small percentage of employees working from home. It is understood that each company has implemented a plan of sanitary measures for the protection of employees. For the economic recovery, the government has established a strategy to stimulate public investment. As a result the entire process of awarding public construction projects has been accelerated, which has been to the advantage of design and consulting companies this summer.
SERBIA	Construction Sites in Serbia were never fully closed due to COVID-19. The government of Serbia issued letter of recommendation to continue with the construction activities during the pandemic, while the Employers were advise to provide face masks and sanitizers for workers on the Site. At the beginning of the pandemics, large nubmer of employees has worked remotely. Now, that number is significantly reduced and is applicable only for industries where such approach is not significantly affecting the company activities (IT sector, banks etc.). Face masks are still manadatory inside and during public gatherings. Disinfection of offices is conducted on regular basis.
SPAIN	1) Companies seek to continue safeguarding the health of employees with a more flexibility when it comes to working from home and also increasing sanitation of offices. 2) Most world companies support the idea that investment in social and economic infrastructure is key to economic recovery. 3) The "Recovery Plan" based largely on sustainability, innovation, new renewable energies, digitalization, climate change, is being advocated by the Spanish engineering companies.
SWEDEN	Sweden hasn't had a lockdown. Most businesses have remained open, if they have had projects. otherwise they have furloughed most of their staff.

SWITZERLAND	None, compared to previous survey.
TURKEY	<ul style="list-style-type: none"> • Improving to work and operate remotely. • Health and safety and informative notes. • Measurement and control of fever. • Random PCR tests. • For the ones travelling both to Turkey and from foreign countries, quarantine or PCR tests depending on the origin of the country. • Establishment and maintaining COVID-19 Pandemic Respond Plan. • Communicate among stakeholders and ensure a respectful work environment. • Prioritize health and safety. • Special regulations for entering and leaving job sites. • Office cleaning and disinfection procedures. • Limiting and removing internal touch point areas. • Vehicles, equipment are assigned to single individuals. • Special care for incoming posts/cargo. • Screening of staff entering to construction sites • Quarantine procedures for staff who exhibits symptoms and/or possible contact with confirmed cases. • Instructions for measures to be taken for international traveling. • Measures to be taken when using company cards. • Procedures for drivers.