



Results of 2nd Survey (7-10/4/2020)

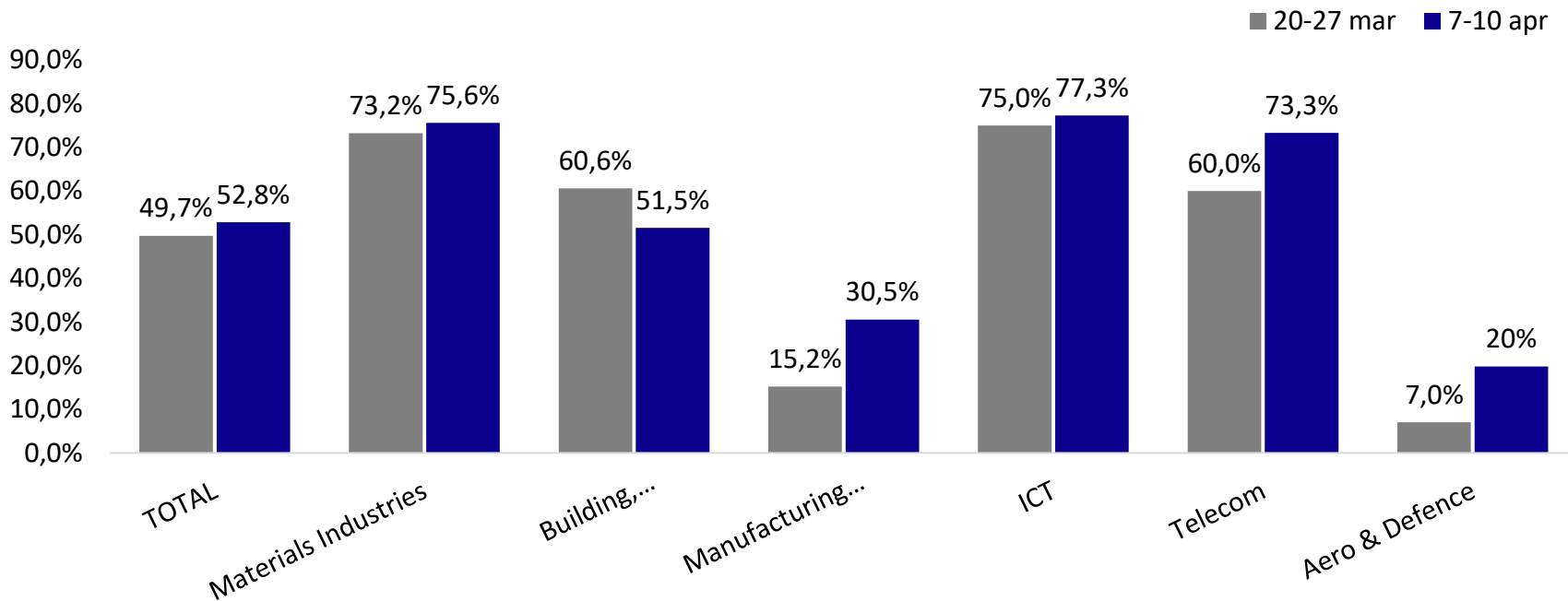
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1.a Actual activity rate: % of normal activity (10/04/2020)

	Total	>250	<250
Technological Industries	52,8%	51,3%	59,1%
Materials Industries	75,6%	78,9%	66,1%
Building, Contracting & Technical Services Industries	51,5%	50,4%	54,6%
Manufacturing Industries	30,5%	24,1%	51,9%
Digital Industries	77,7%	77,4%	79,6%
Telecom	73,3%	73,1%	
Aeronautics, Space, Security & Defense Industries	19,8%	11,8%	66,9%

1.a Actual activity rate: % of normal activity (10/04/2020): evolution since 23 mars



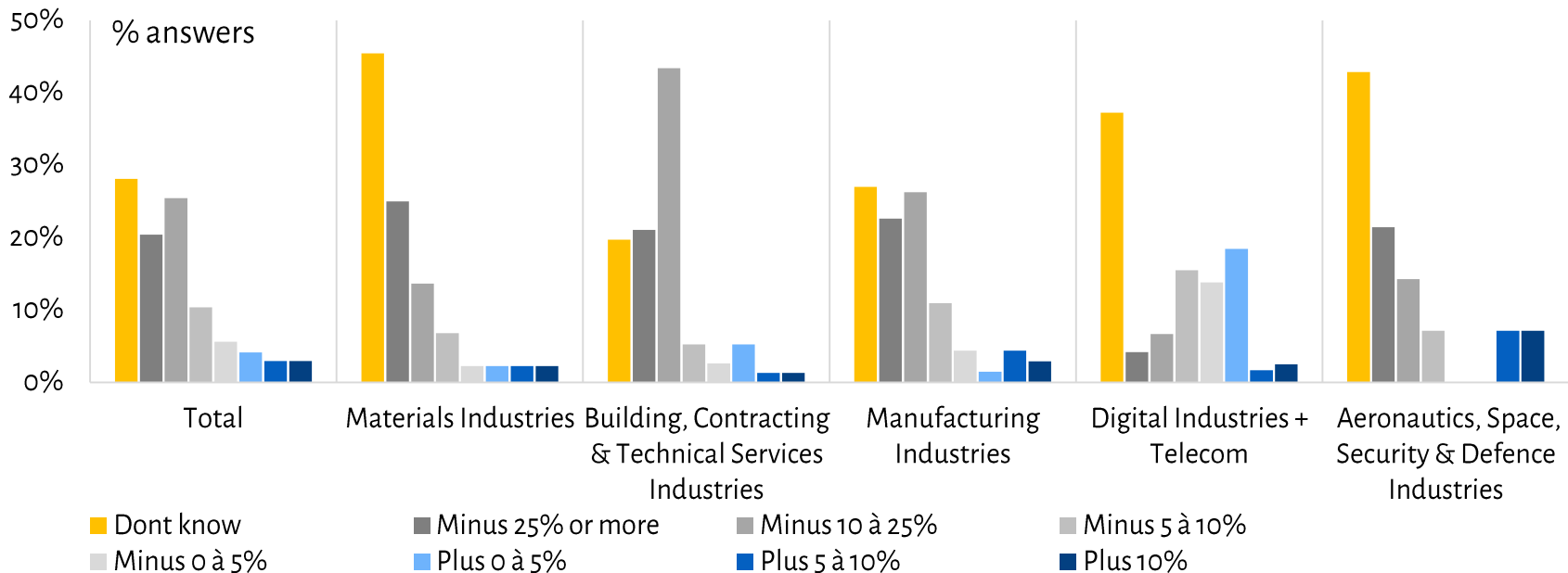
1.a Slight increase in activity rate since 23 march

- **Extension of the list of essential activities**
- **Restart after implementing social distancing**
- **Activity still on a unsustainable level**

1.b What limits the activity?

% of answers	Total	Manufacturing Industries
1. Demand	66,6%	65,7%
2. Rules of Social Distancing	39,1%	43,8%
3. Availability of employees	37,6%	43,8%
4. Supply of raw materials and parts	39,1%	51,1%
5. Personal protective equipment against dangerous substances	20,4%	24,1%
6. Transport and logistics, ...	25,7%	29,9%
7. Financial problems	9,8%	10,9%

2. Estimation of growth rate for 2020?



3. Supply Difficulties (1)

% Yes	Overall	Extra-EU	Intra-EU
Manufacturing	58,3%	26,9%	55,4%
Maintenance, Installation,...	61,5%	30,8%	57,7%
Commercial activities /import	55,4%	35,7%	50,0%
ICT-service & Telecom	15,4%	7,7%	11,5%
Total Tech. Industries	48,1%	24,2%	44,5%

3. Supply Difficulties (2)

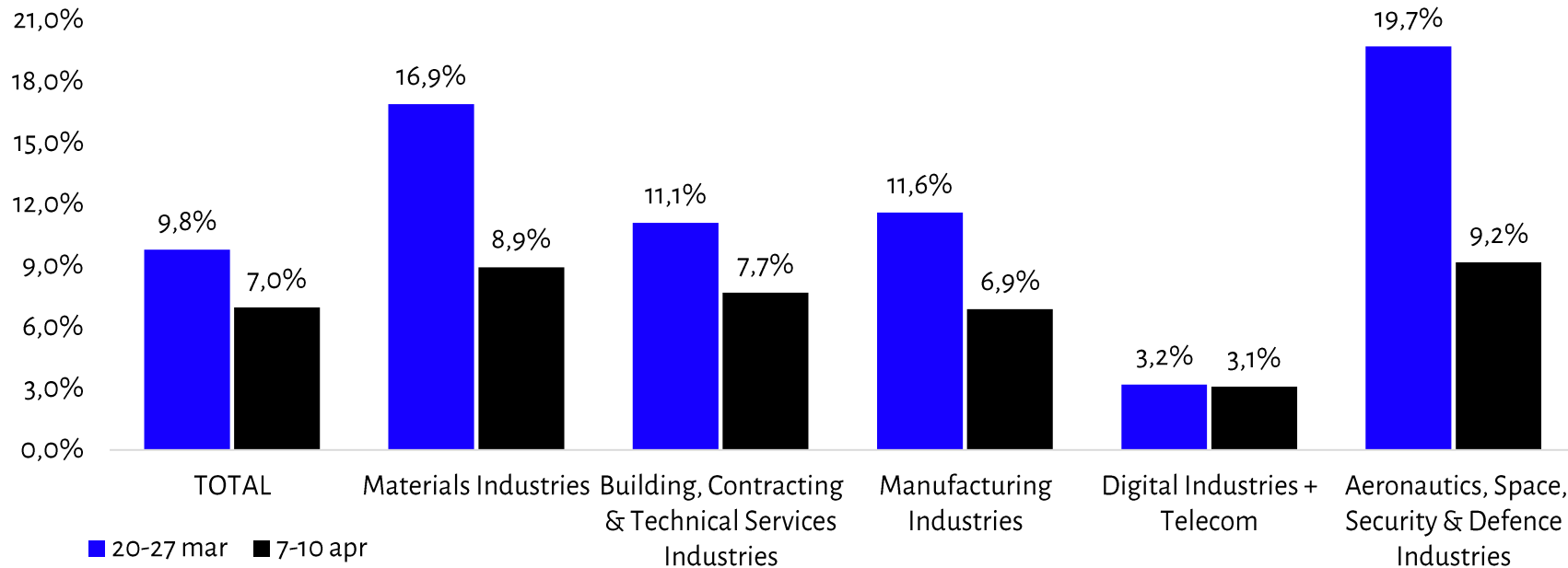
% Yes	Intra-EU	Problems with rules internal market	Interruption of activity of supplier
Manufacturing	55,4%	13,7%	53,1%
Maintenance, Installation,...	57,7%	15,4%	46,2%
Commercial activities /import	50,0%	19,6%	48,2%
ICT-service & Telecom	11,5%	1,3%	10,3%
Total Tech. Industries	44,5%	11,9%	41,8%

3.e Problems with customs, trade, transportation

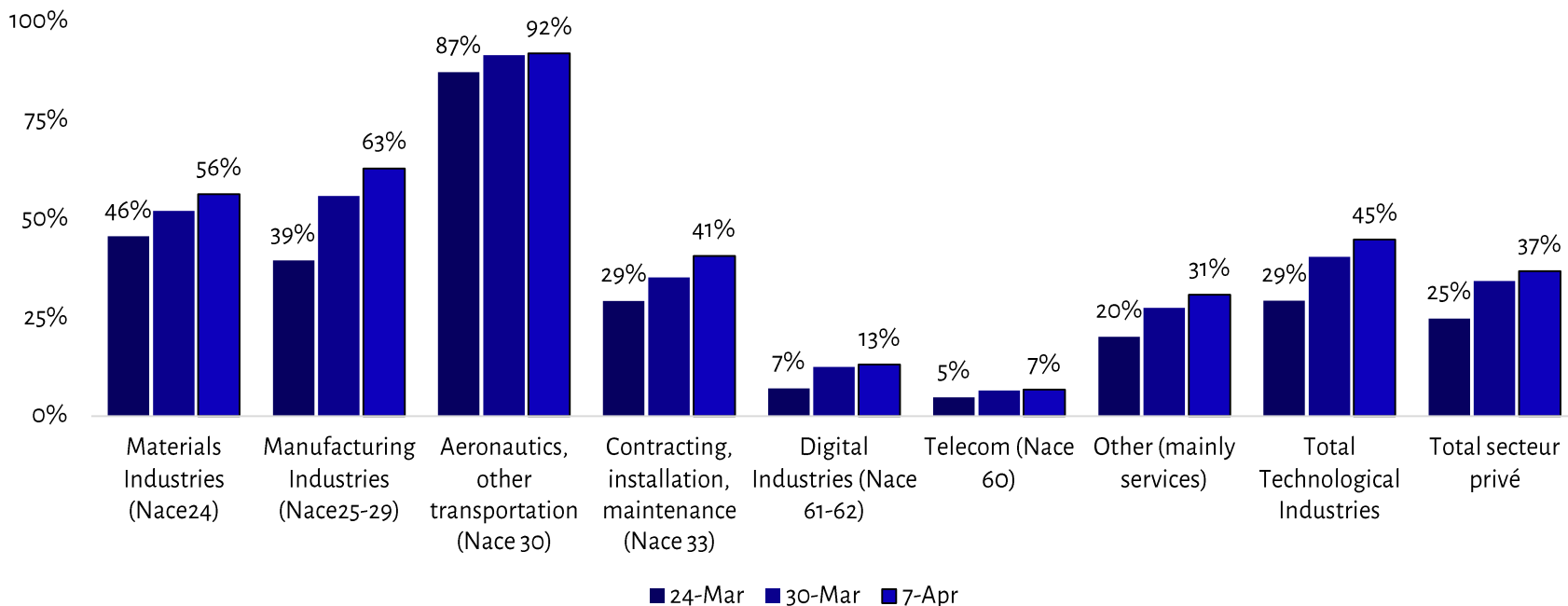
- **Price-increases (air freight) (12% of relevant answers),**
- **Delays, uncertainty, inability to plan, France and Italy are cited most**
- **Fear of major bottlenecks when restarting,**
- **Custom procedures for specific cases (protective material).**

4. Percentage of absenteeism 4.b Sick leave

% of staff

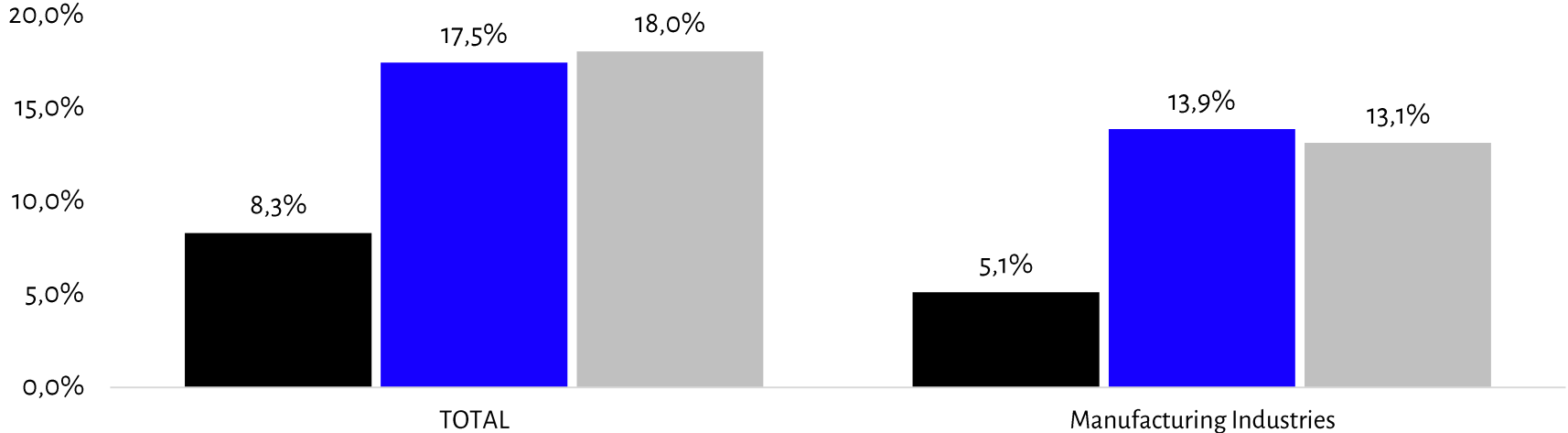


Temporary unemployment: numbers are increasing



5.d. Extra reward for people who work

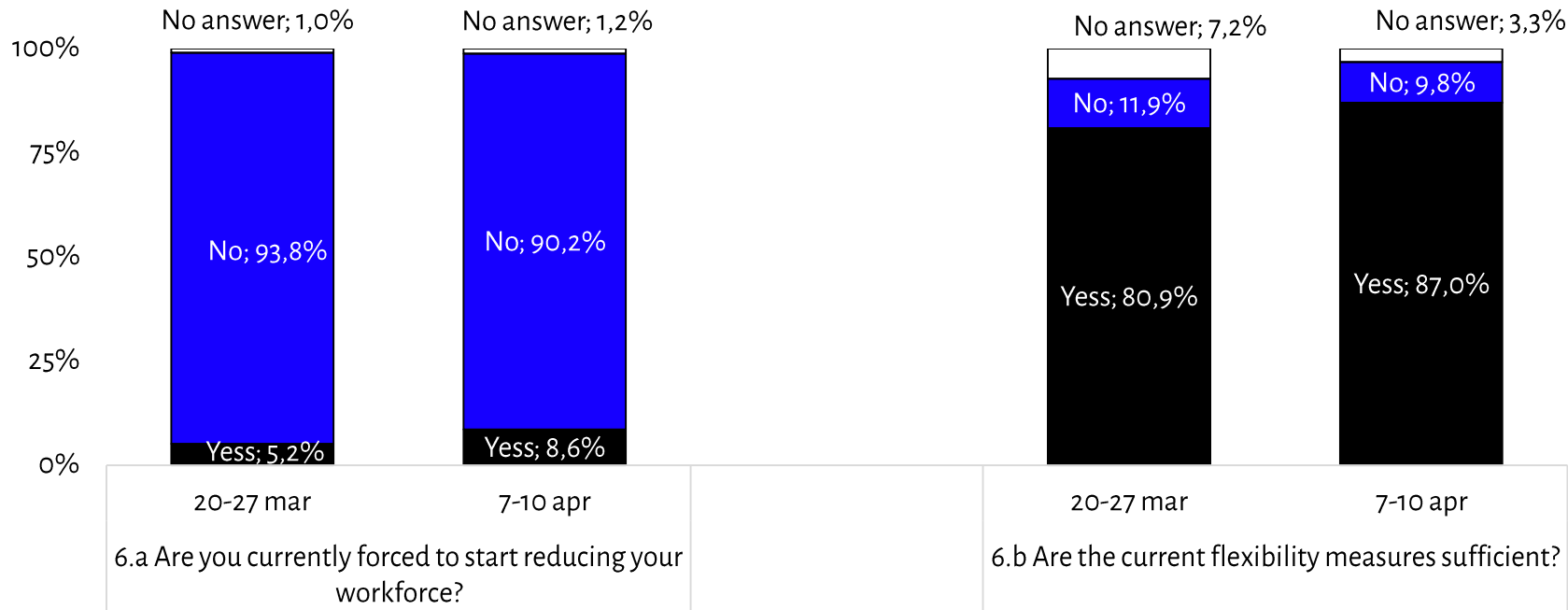
% Yess



- 5.d.1. Does your company provide an extra reward for people who work?
- 5.d.2. Are you considering such a reward
- 5.d.3. Do you thing this is apporpriate?

6. Staff reduction

% answers



Social distancing



7. Crucial sectors and essential services

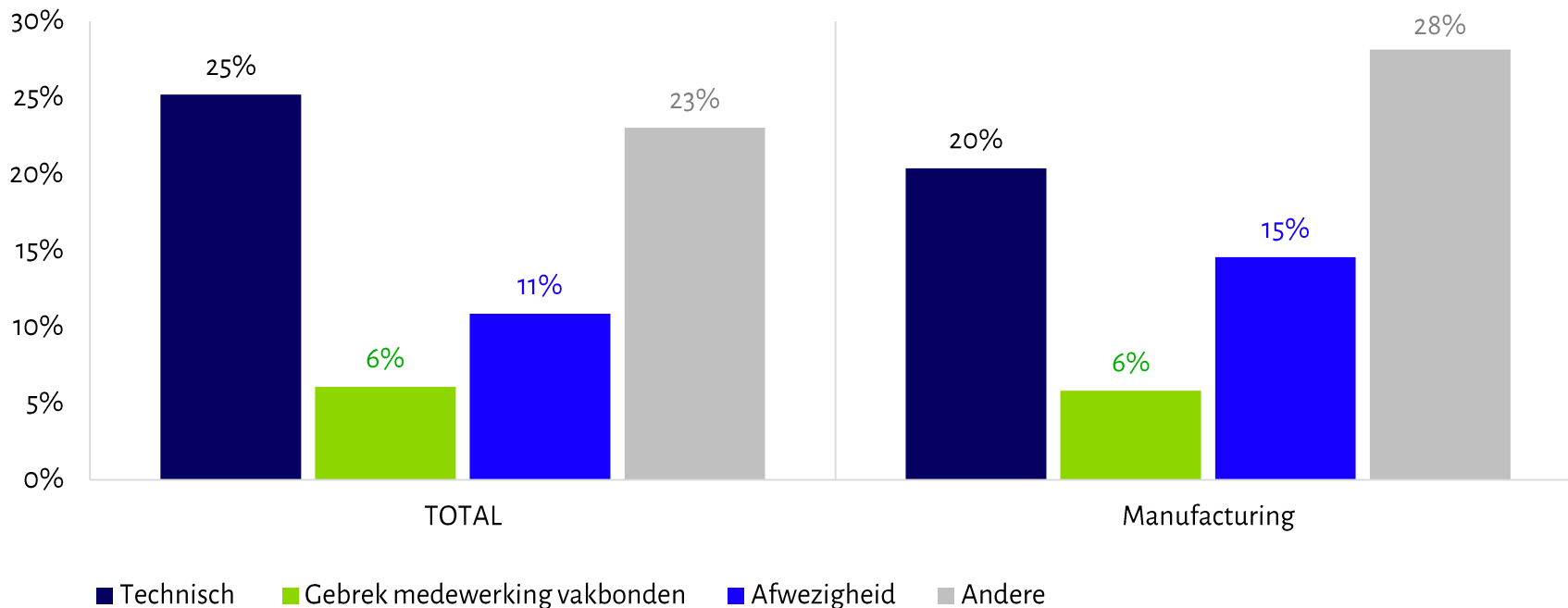
% of volume of activity	Yes	No	Partly	Dont know
Technological Industries	46,2%	31,2%	19,6%	3,0%
Materials Industries	59,9%	33,9%	6,1%	0,0%
Building, Contracting & Technical Services Industries	29,5%	22,3%	48,0%	0,2%
Manufacturing Industries	24,0%	60,7%	11,6%	3,7%
Digital Industries	33,6%	11,6%	44,7%	10,1%
Telecom	100,0%	0,0%	0,0%	0,0%
Aeronautics, Space, Security & Defense Industries	86,9%	5,8%	7,4%	0,0%

8. SOCIAL DISTANCING in non – crucial sectors and services: obstacles for implementing social distancing

- **30% has no problem**
- **25% does not know yet**
- **25% technical problems in production and transportation**
- **6% relation with trade-unions**
- **11% employees non-available**
- **23% other difficulties**
 - Very strict regulations that make a global prevention approach impossible
 - Access to sites clients
 - Impact on productivity

8. SOCIAL DISTANCING in non – crucial sectors and services: obstacles for implementing social distancing

% antwoorden niet-cruciale sectoren en diensten



10. Financiële Impact

	Totaal	>250	250-100	<100
10.a Do you already have financial problems?	14%	15%	13%	14%
10.c Do you use the financial and fiscal support measures	33%	27%	27%	39%

Comments:

- **22 growing deferral of payments**
- **35 no acute liquidity problems yet but expect problems in the short term**
- **10 report problems with credit- insurance**

10. d Use of the financial and fiscal support measures

% of companies using financial and fiscal support measures (33%)	Total	>250	250-100	<100
Deferral VAT	63%	71%	70%	59%
Deferral labour tax	68%	83%	75%	60%
Prepayment Corporate Tax	27%	54%	25%	18%
Deferral ONSS- RSZ	58%	71%	55%	54%
Postpone capital repayments	36%	25%	25%	43%
Bridging loans	12%	21%	10%	9%

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Thank you

For your attention

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