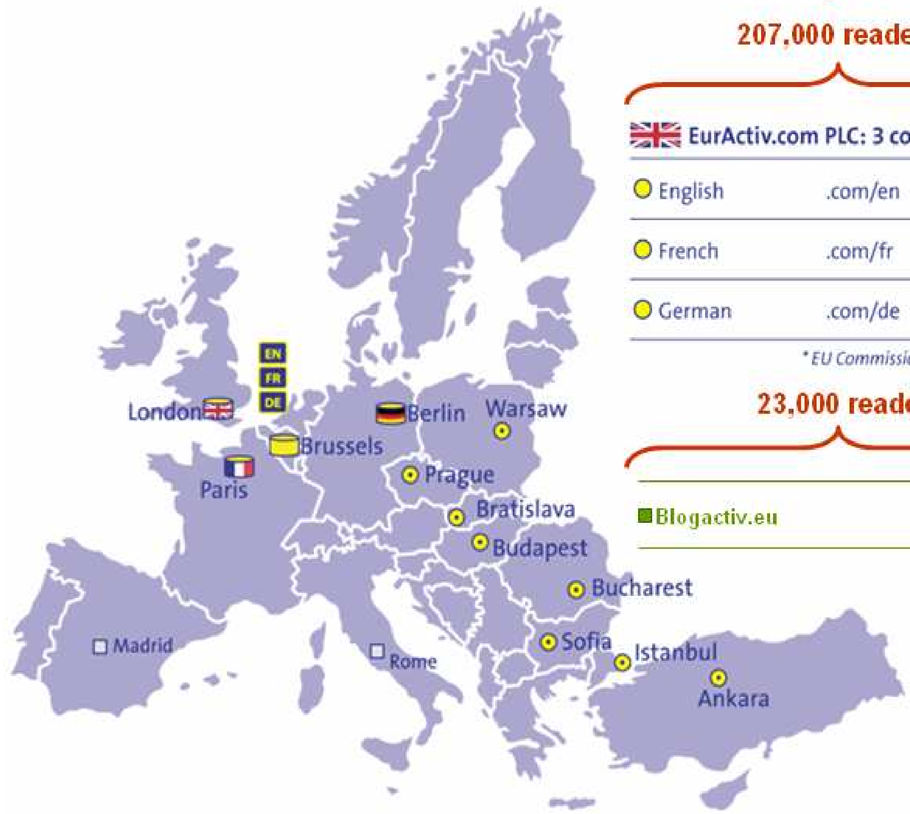
PA Memberships

Presentation to the SEAP General Assembly
6th April 2009

Based on EurActiv Surveys 2009
in Co-operation with

EurActiv Network

10 EU Policy Portals



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☐ Additional countries considered

*unique visitors, EurActiv Network and Blogactiv, October 2008

EurActiv Surveys

- CrossLingual (In all network countries)
  2003, 2005, 2007
- Federations
  2004, 2005, 2006, 2007, 2008, 2009
- Consultancies
  2009
- Media
  2007, 2008
- Corporates
  2004, 2007, 2009

(Publication dates, not field work)

Methodology of Surveys 2009

- 3 parallel surveys targeting: Federations, Consultancies & Corporate EU representations.

  + questions to all on TRANSPARENCY

- Method: Dissemination via targeted email & responses collected online.

- Survey period: 8 Oct.- 27 Nov. 2008.

- Number of respondents: 312

(170 Federations, 75 Consultancies & 67 Corporates)

- Qualitative and indicative survey.

- Results: 2009 = Extracts > Summary > Full publication.

Highlights

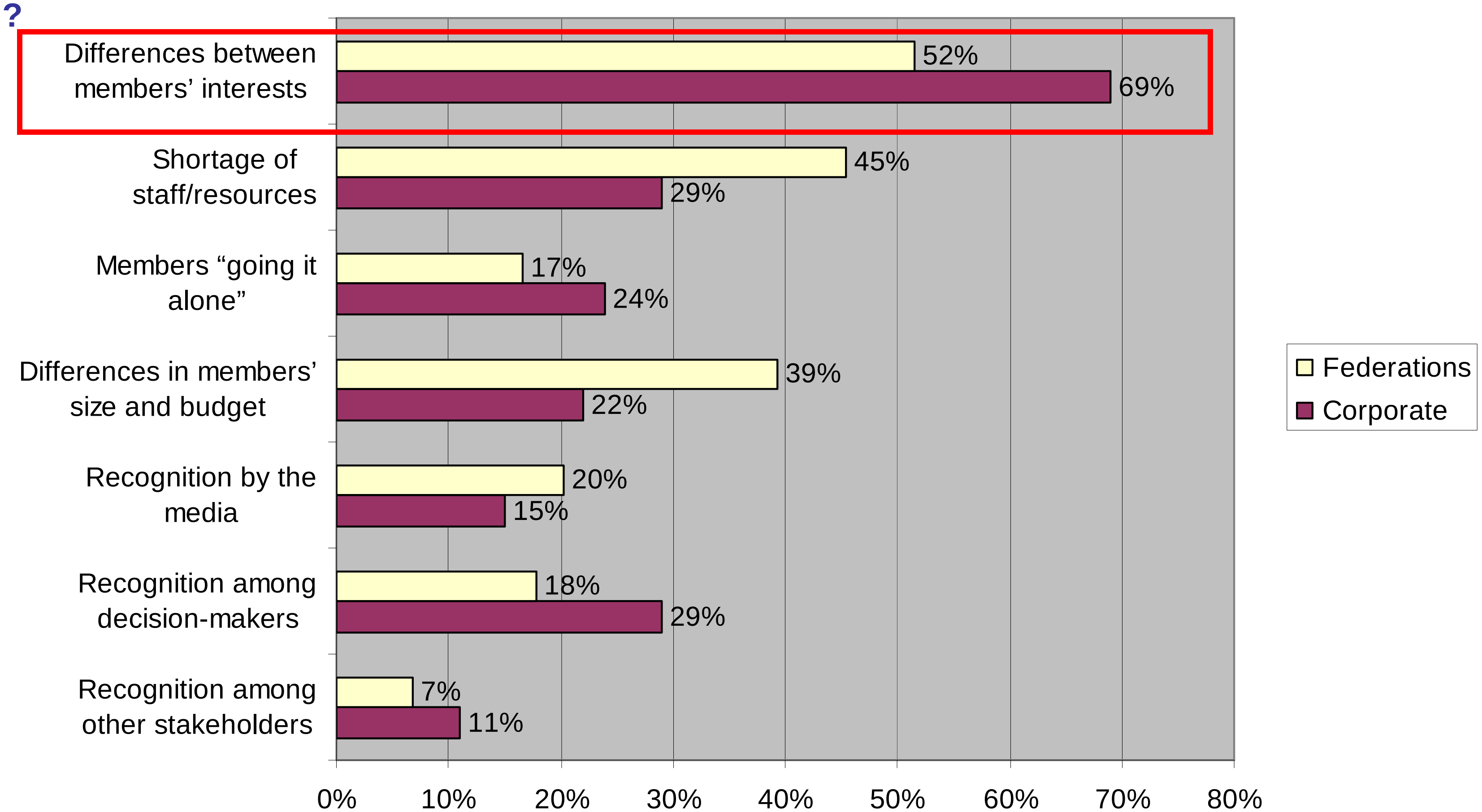
Federation Membership: Contrasting staff and members' views

- Both federations and corporates agree that the **biggest challenge** for federations is **balancing members' differing interests**
- Federations expect **moderate membership growth** in the coming years. (poll: Oct.-Nov. 2008)
- Federations and corporates agree that **federations' biggest value-added** is **policy influence via lobbying**
- Federations mention **legislation monitoring** as similarly valuable
- Corporates place significantly more value on sharing experience/liaising with peers, i.e. value from other members rather than the federations staff

Challenges faced by federations

FEDERATIONS What do you consider to be the biggest challenge your organisation is facing?

CORPORATES What do you consider to be the biggest challenge faced by the federation(s) you are a member of ?

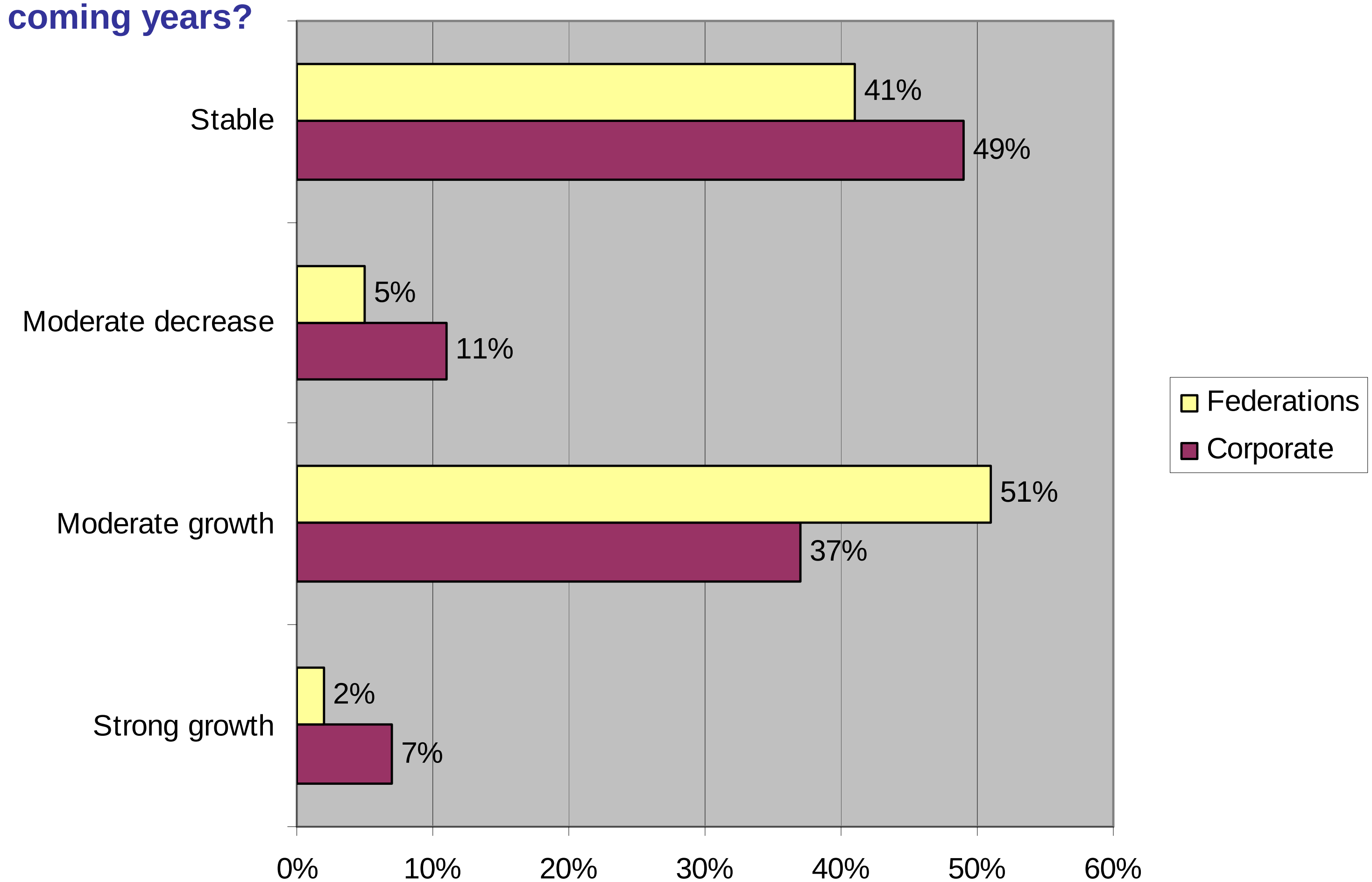


→ The biggest challenge faced by federations is to handle the difference between members' interests.

Fluctuation of federations membership

<u>FEDERATIONS</u> How do you expect your membership to fluctuate in the coming years at EU Level?

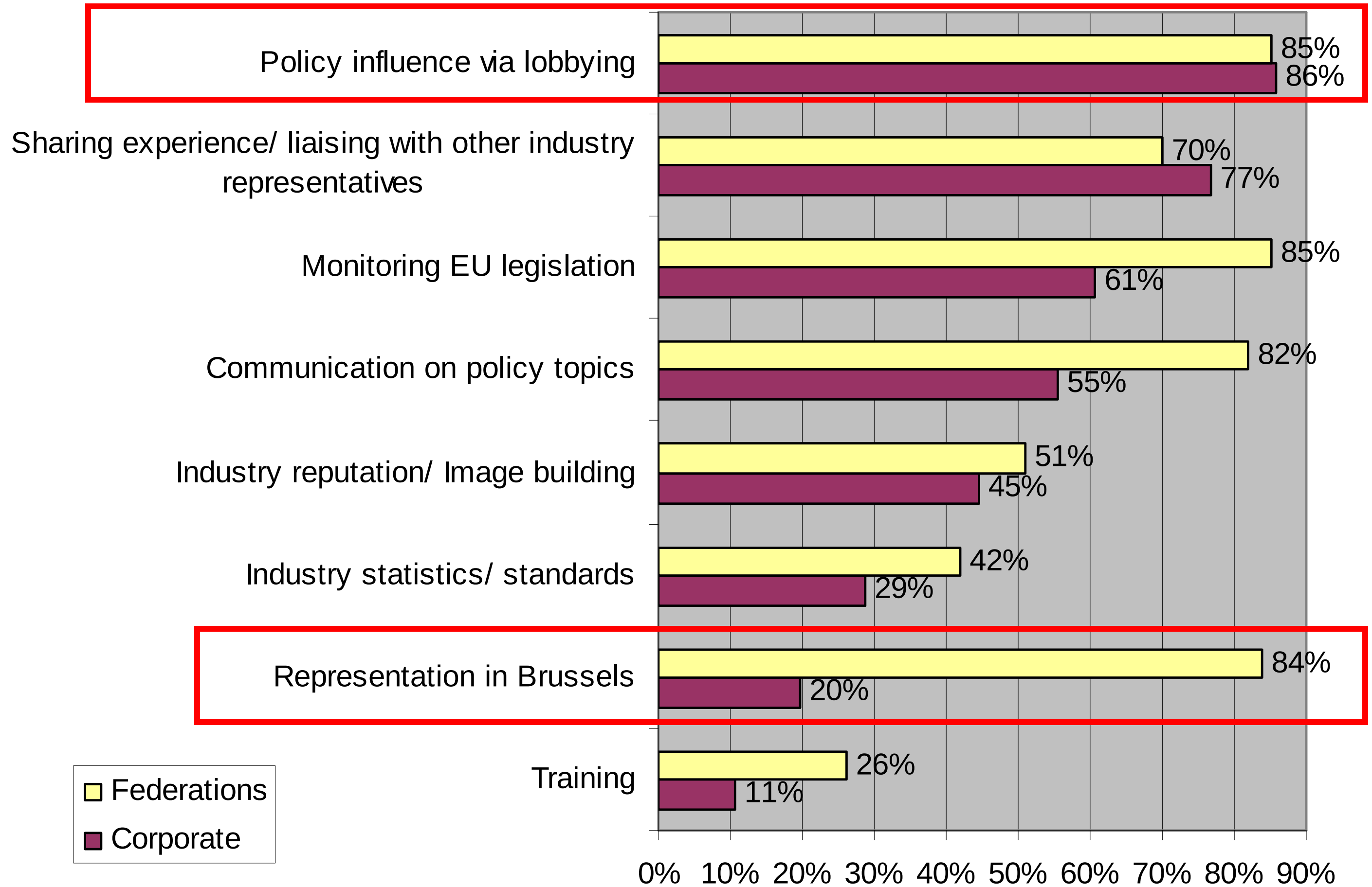
<u>CORPORATES</u> How would you assess the trend of companies becoming a member of federations at EU level in the coming years?



→ Federations expect moderate membership growth in the coming years.
→ Corporates expect it will be stable.

Added-value of membership

FEDERATIONS What added value do you offer to your members?
CORPORATES What is the main added value of your federation membership?

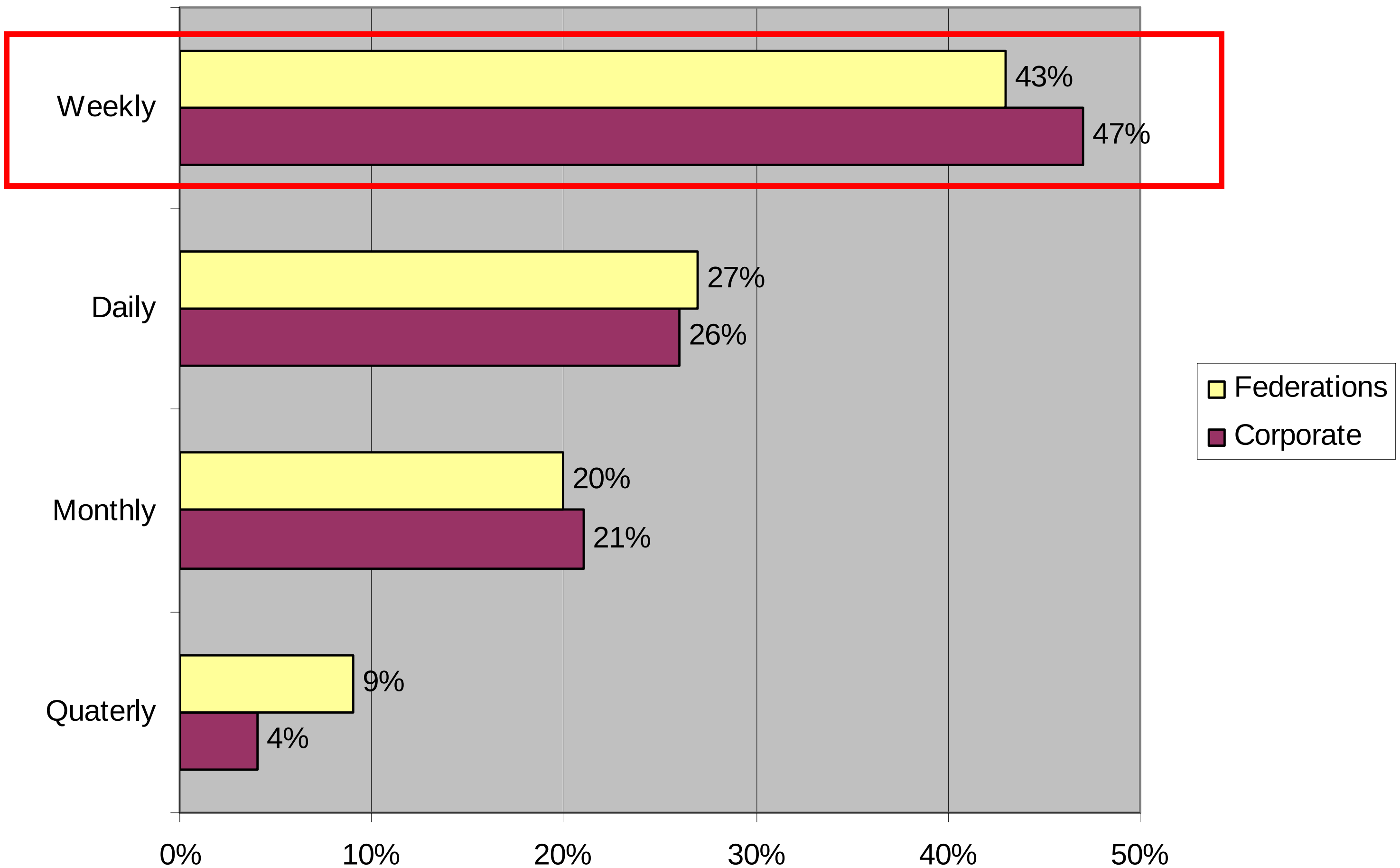


→ Federations and corporates agree that federations' biggest value-added is policy influence via lobbying.

How often do federations communicate with their members?

<u>FEDERATIONS</u> How often do you communicate with your members via official communications from the secretariat?

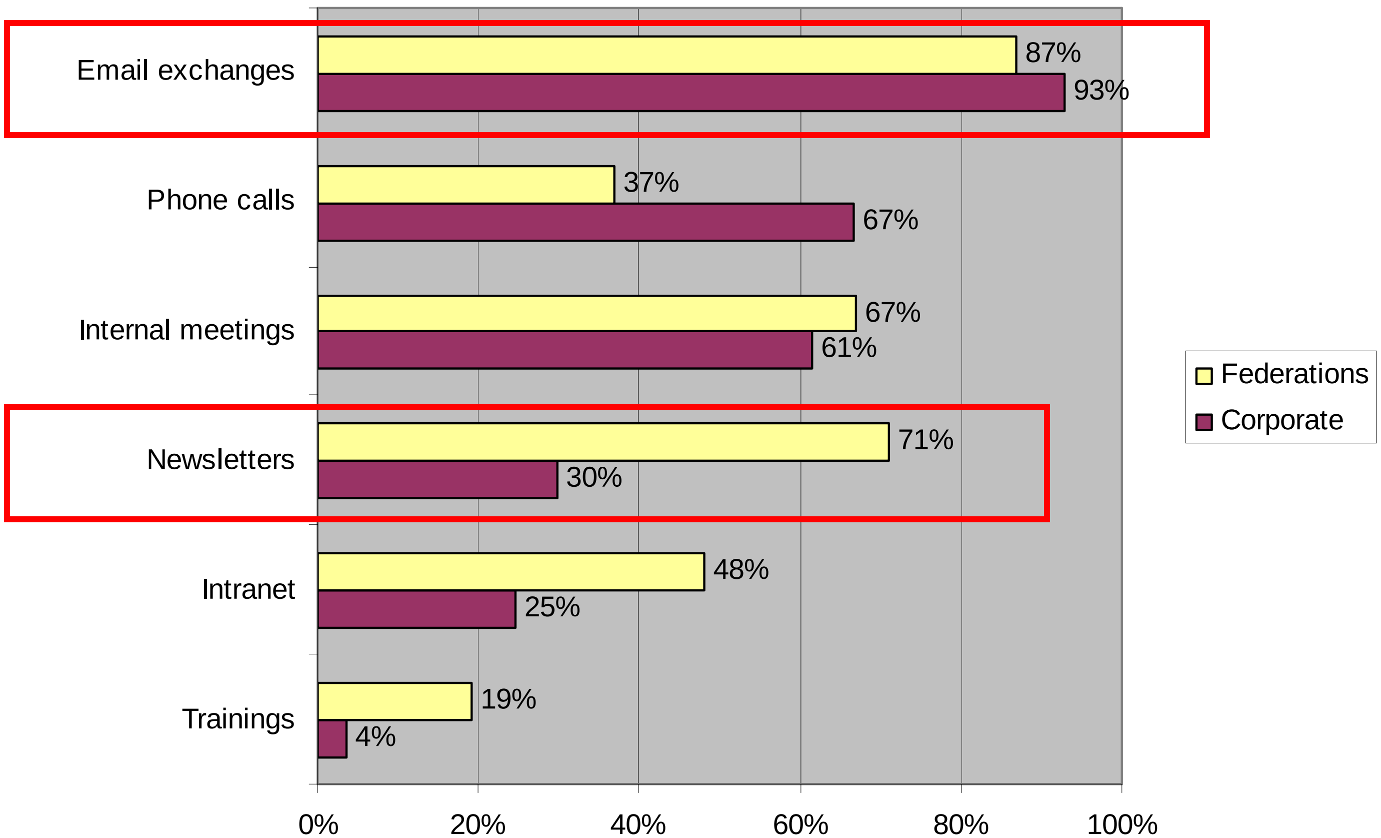
<u>CORPORATES</u> How often is there direct contact between you and your federation(s)?



→ Federations and Corporates communicate preferably on a weekly basis.

Most efficient/preferred way of communication between federations & their members

FEDERATIONS What is the most efficient way of communicating with your members?
CORPORATES How do you prefer your federation(s) to contact you?



→ Corporates and federations agree that email exchange is the preferred way of communicating. Internal meetings are also highly ranked.
→ Federations consider Newsletters to be the second most efficient way of communicating with members, whereas corporates prefer to be contacted by phone.

Blogs, Videos & RSS

Blogs

- Blogs are seen as a good platform to gather experts / different stakeholders, rather than a risk.
- Consultants are more blog-oriented than federations and corporates.
- Monitoring is still the main activity, instead of pro-active use.

Video

- Corporates are more online video-oriented than federations and consultancies.
- Hypothesis: already used in headquarters and internally, and easier to control than blogs.

RSS

- Corporates use more content syndication than federations and consultancies.
- Hypothesis 1: already used on corporate intranets.
- Hypothesis 2: better control than blogs and lower cost & technology threshold than video: fast dissemination possible.

« Appetizers » from the surveys on PA Trends

- **For Corporates:** Communication decisions are made in headquarters, whereas policy decisions are made in Brussels or jointly.

  → See more on communication vs. lobbying resources.

- **For Consultancies:** Half of corporates & federations prefer to use their own staff.

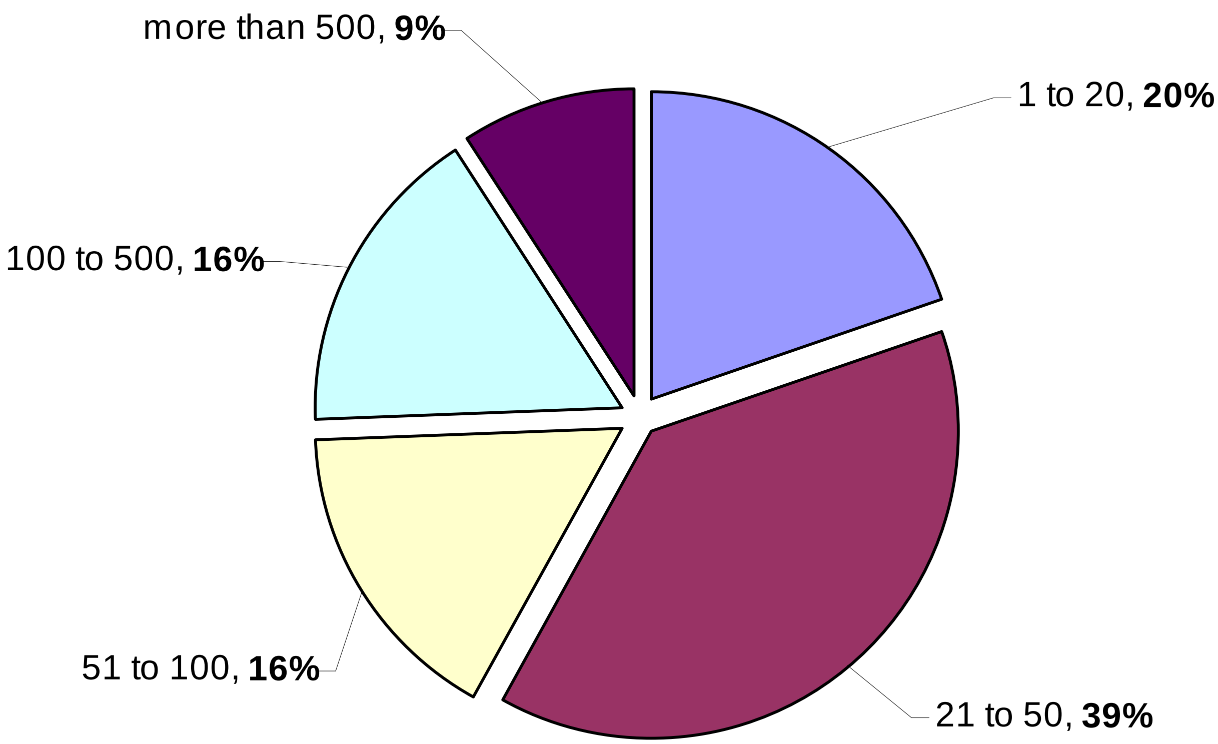
  → See more on budget availability for consultants.

- **For Federations:** Half have more than 50 members, and trend is increasing, esp. corporates.

  → Will this continue with the crisis?

PA Membership from FEDERATIONS' point of view

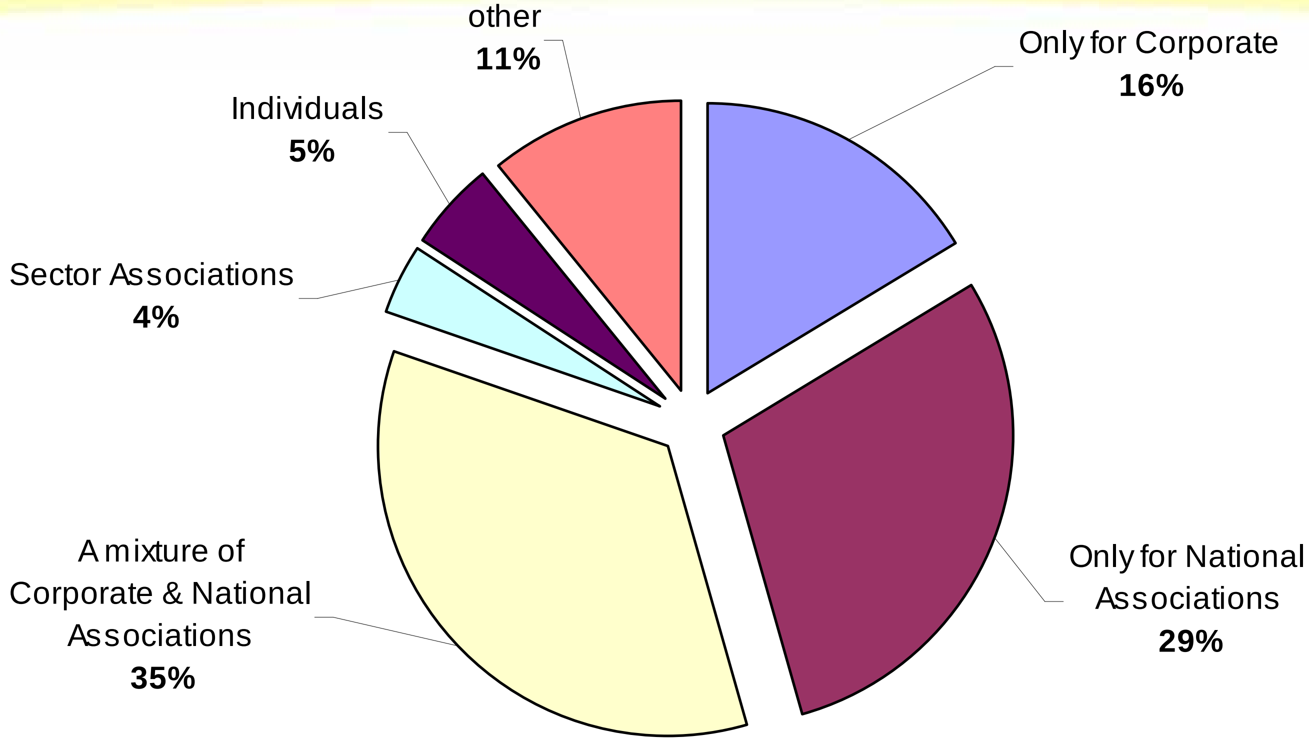
How many members do you have in your organisation?



→ 39% of federations have between 21 and 50 members. We can assume most federations cover the 27 Members States with their memberships.

→ More than 40% of them declared they have in excess of 50 members.

How would you describe your membership structure?

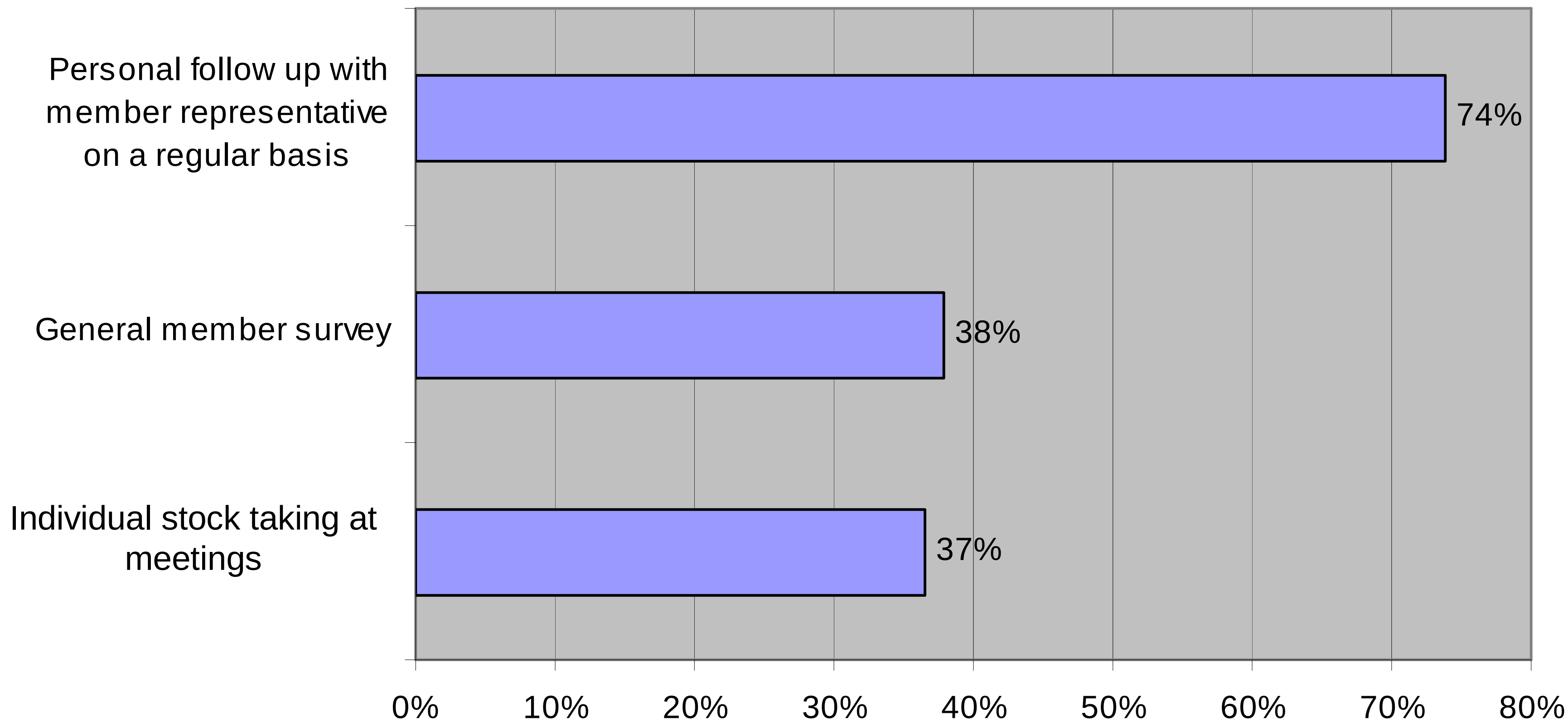


→ 35% of respondents described their membership structure as a combination of Corporates and National Associations.

→Adding corporate membership has been the main trend of the last year due to economic reasons.

→The reverse trend (adding national associations as members) is happening too, with the aim of achieving a broader scope for the association.

How can you ensure that your value proposition remains valid for your members?



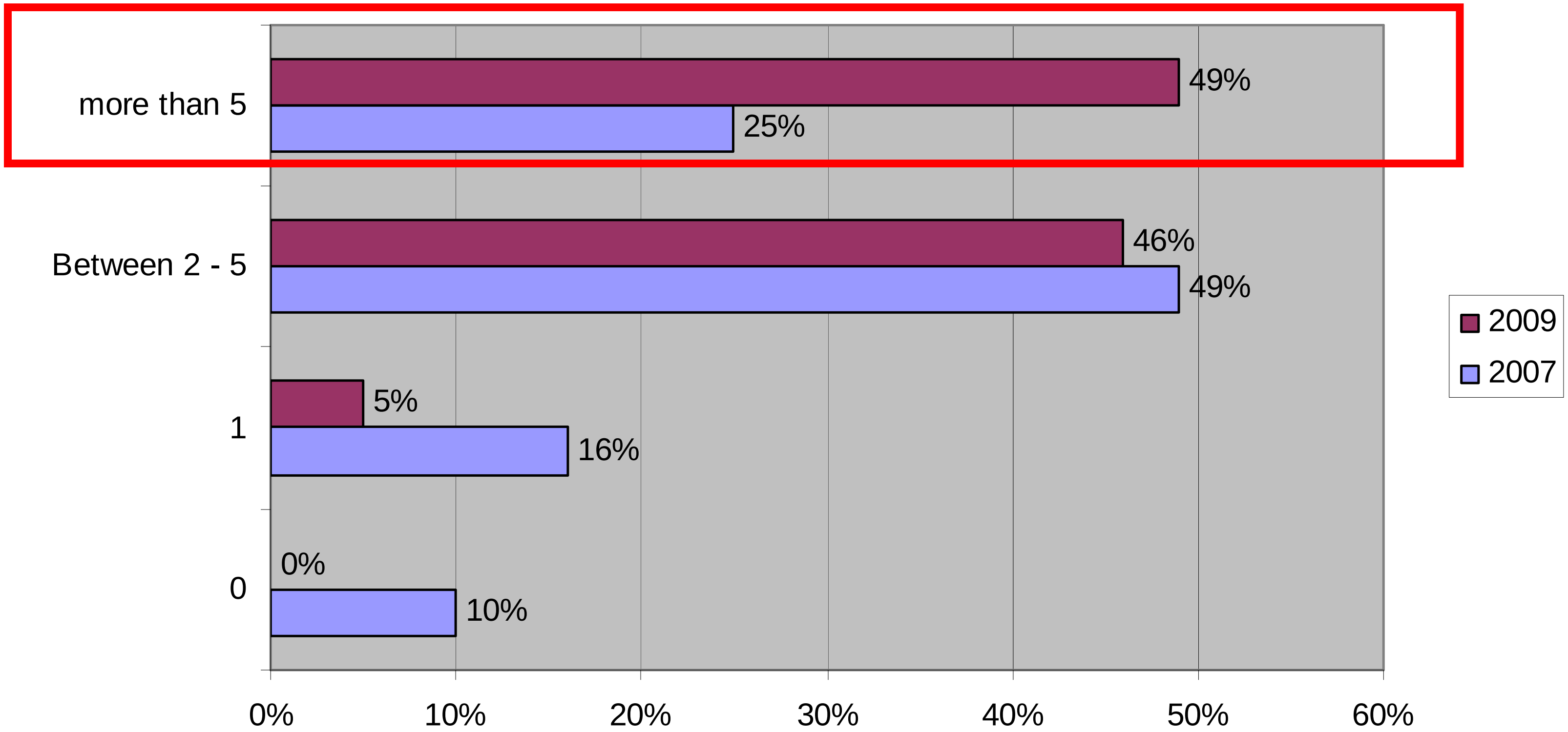
→Personal direct contacts with members are fundamental to understand needs/interests of the members, adapt the association's activities, sometimes leading to a change of direction

→Members' survey and stock taking at meetings are normally used.

PA Membership from CORPORATES'point of view

How many federations/European industry associations is your company a member of?

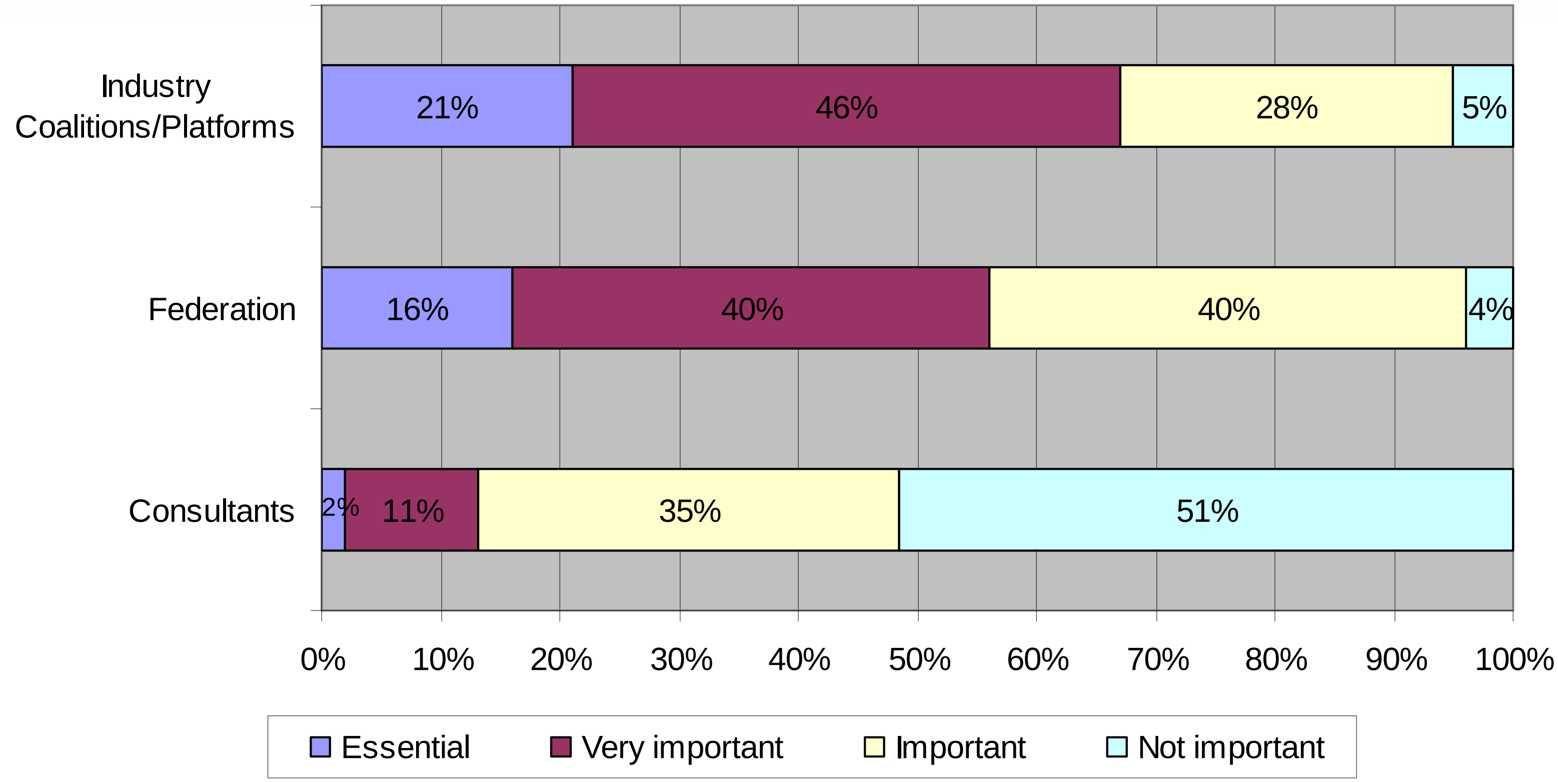
Trends 2007/2009



→Companies have joined an increasing number of associations. Nearly half are members of more than five associations (compared to 25 % in the 2007 EurActiv Survey of corporates).

→ Only 5% of the respondents are members of zero or only one association (compared to 27% in 2007).

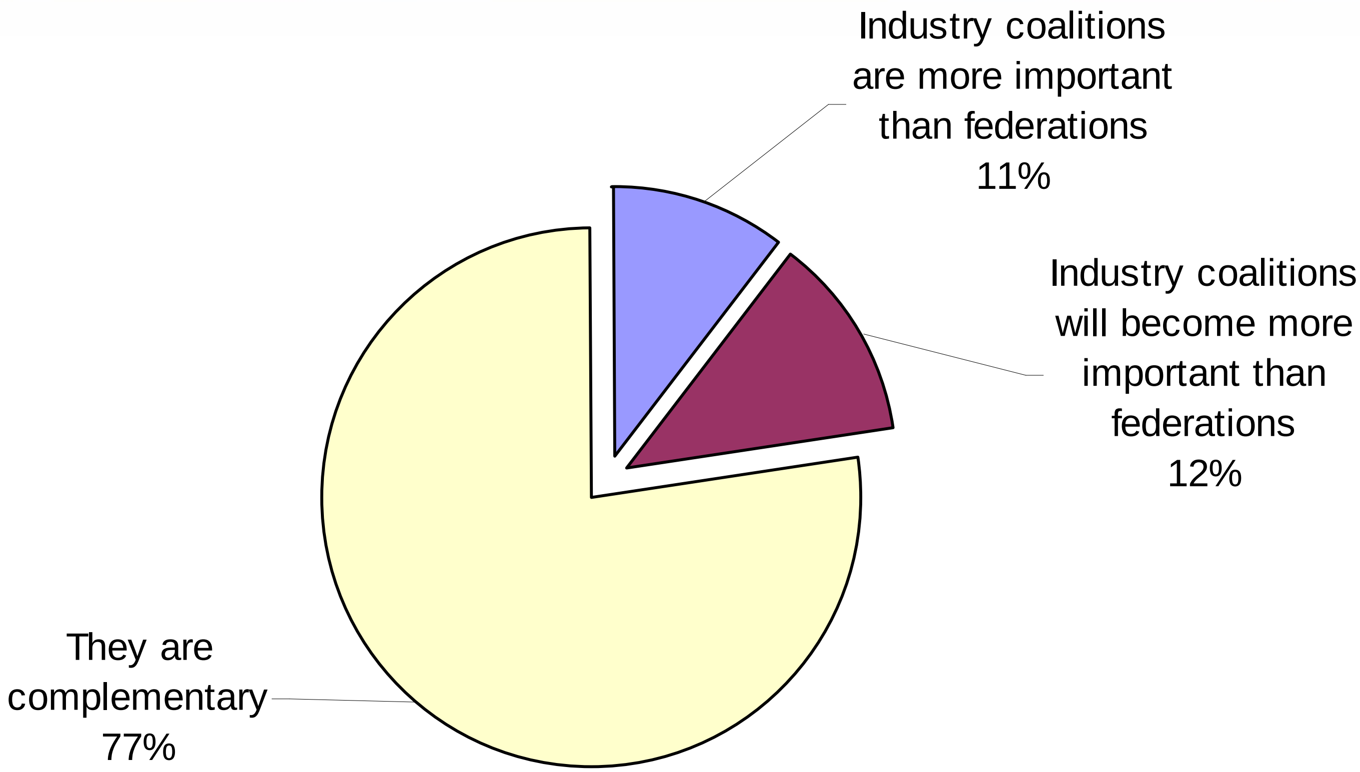
How important are federations, consultants and (ad hoc) industry coalitions for the achievement of your public affairs objectives?



→ Federations and especially ad hoc industry coalitions are regarded by more than 90% to be important to achieve their public affairs objectives.

→ By contrast, less than 50% regard consultancies as important, with only 13% believing them to be essential or very important. This confirms survey findings of 2007.

How do you view the relationship between (ad hoc) industry coalitions and federations?



→ According to 77% of companies responding, industry coalitions and federations are considered to be complementary.

→ This confirms the 2007 survey results, which indicated that both are very important in achieving their EU affairs objectives.

For more information

Surveys: trends among federations, corporates, consultancies and for the European Transparency Initiative

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